



Foundation

Annual Report

2018/2019

“YOUR SUPPORT STRENGTHENS OUR COMMUNITY”

www.epcf.com.au or admin@epcf.com.au





Foundation

Our Mission:

The Eyre Peninsula Community Foundation enables the people of the Eyre Peninsula to proactively contribute to the long term benefit of our region by:

- Building community endowment
- Addressing local needs through charitable grant making
- Encouraging philanthropy



Geographical Area of the Eyre Peninsula Community Foundation

This is a vast area stretching from the Gawler Rangers in the north to Port Lincoln in the south and from the Spenser Gulf in the east to the border of South Australia and Western Australia

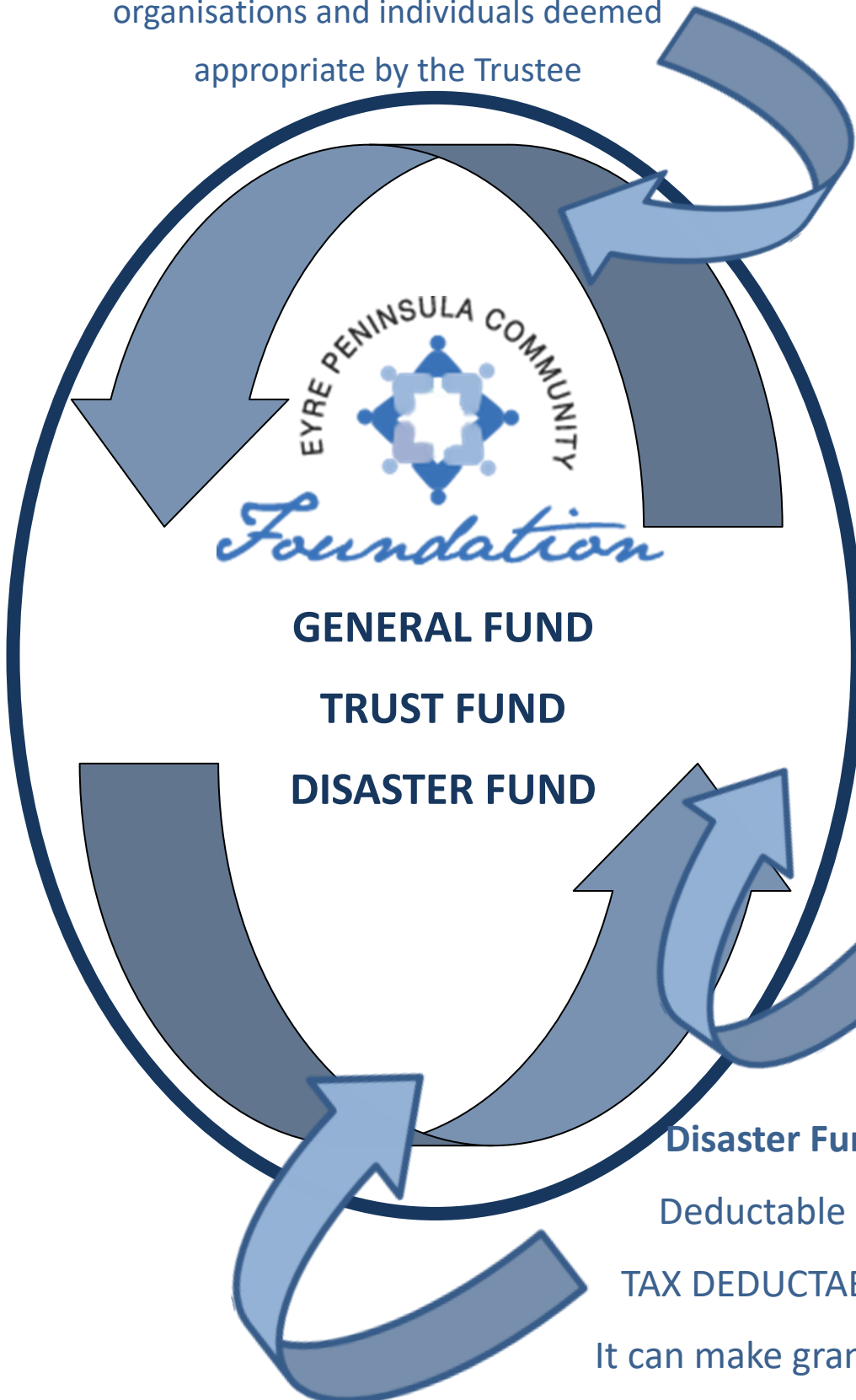
This region encompasses the cities of Port Lincoln and Whyalla and the District Councils of Ceduna, Cleve, Elliston, Franklin Harbour, Kimba, Lower Eyre Peninsula, Streaky Bay, Tumbly Bay and Wudinna as well as part of the region serviced by the Outback Communities Authority

General Fund is a “TCC” Tax Concession Charity

NON TAX DEDUCTABLE DONATIONS

It holds money for specific “Theme”
& “Named” Funds.

It can make grants to DGR’s and other
organisations and individuals deemed
appropriate by the Trustee



Trust Fund is a
“DGR”

Deductable Gift
Recipient

TAX DEDUCTABLE
DONATIONS

It holds money for
specific “Theme” &
“Named” Funds

It can make grants
only to other DGR’s

Disaster Fund is a “DGR”

Deductable Gift Recipient

TAX DEDUCTABLE DONATIONS

It can make grants to other DGR’s

& individuals in necessitous circumstances

Eyre Peninsula Community Foundation Patrons



Peter Treloar MP—Patron

Born and raised on a farm near Cummins, Peter Treloar MP is a fierce and devoted advocate for the Eyre Peninsula. Peter went straight into agriculture after finishing school (at Cummins Area School and Prince Alfred College) where he enjoyed a long and rewarding career.

From this he has a particular understanding of small business and the pressures the sector experiences.

Peter believes that the natural environment underpins our communities. On Eyre Peninsula the issue of water security is forefront, and one of his first achievements as an MP was to instigate, through

Parliament's Natural Resources Committee, an Enquiry into the Eyre Peninsula Water Supply.

His leadership on a variety of industry boards, including Primary Producers SA, Grains Council, Nuffield Australia and EPNRM, has provided him with strong skills in mediating between government and industry groups. Peter was awarded a Nuffield Scholarship in 2002, enabling him to travel extensively and research value-adding opportunities for Australian grain, and grain industry structures.

Peter has held a variety of roles during his time as the Member for Flinders, including being the Shadow Minister for Emergency Services, Veterans Affairs and Volunteers, Leader of the Opposition's Parliamentary Secretary, Shadow Cabinet Secretary and Opposition Whip. He is currently the Deputy Speaker and Chair of Committees with the current State Government, a role he is relishing.

While he is member of various government and volunteer organisations, he is the patron of the Cummins Show, W&CH Auxiliary Port Lincoln branch, Mentoring EP and the Mortlock Shield, to name a few.

Peter and wife Annette reside on the family farm at Edillilie.



Tony Irvine—Patron

Tony Irvine has been a Chief Executive Officer in Local Government from 1993 to 2018 (except for a break of twelve months in 2011 where he managed his own consulting business).

He is a member of the Australian Institute of Company Directors, an Associate of the Institute of Municipal Management, member of the Local Government Managers of Australia and a Justice of Peace.

Tony has held many positions on state and national committees whilst employed in the Local Government industry.

He has also held various other local and regional committee and Board positions mainly including sport, government and local community interests.

He has also had an interest in his family agricultural and hospitality businesses from 1980 to 2006.

He is one of the founding directors of the Eyre Peninsula Community Foundation and was extensively involved in the establishment of the Foundation.

Eyre Peninsula Community Foundation Ambassadors



Marie Lally AM — Ambassador

Director from October 2009 till November 2017

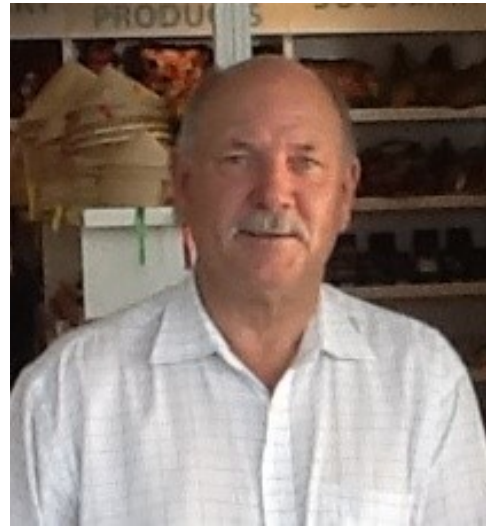
Marie with her husband Kevin have farmed their properties in the Lock, Kopi & Warramboos districts for almost 40 years before retiring to Tumby Bay in 2007.

Marie's dedication to her community and the agriculture industry is evident in the long list of roles she has had on boards and panels over the years.

A number of the panels and boards she has served on are – the SA Arts Council for the EP Region; the Lock Health and Welfare Community Board; the South Australian Country Women's Association going on to be the State President and then later the National President serving from 2000-2003; she was invited to be a member of the Rural Women's advisory Council to the Deputy Prime Minister.

She was the SA representative on the National Rural Health Alliance Friends Advisory Committee and Chair of the National Conference held in SA in 2013; Member of the Lower Eyre Health Advisory Council and an active member of the Tumby Bay Hospital and Uringa Auxiliary. In 2008 Marie became a director on the Australian Year of the Farmer Ltd.

Marie's achievements are not limited to – being awarded Citizen of the Year for the Elliston District Council in 1998; awarded the Centenary Medal of Federation of Australia in 2003, for outstanding service to women in Rural Australia; in 2004 Marie was appointed a Member in the General Division of the Order of Australia AM.



Glenn Karutz — Ambassador

Director from October 2008 till November 2013

Raised on a farming property at Wirrulla, Eyre Peninsula, Glenn left in 1970, and commenced work in a chartered accounting firm. He gained a Bachelor of Arts in Accounting and is a Chartered Accountant, providing business advice in a variety of business sectors. Glenn became managing partner of the Port Lincoln, Adelaide and Sydney offices of his firm and spent over 35 years in this career before retiring in Port Lincoln in 2008.

Active involvement in the community. Past member of the Regional Development Australia Whyalla and EP Board; past President and current Member of Rotary, past Director of the Port Lincoln Bendigo Community Bank and past Member of the board of management at Ravendale Community Sports Centre. A life member of Apex Clubs Australia, Tasman Football Club and a Paul Harris Fellow of Rotary. Currently on the committees of the Lincoln Auto Club and Port Lincoln Auto Sprint in the capacity of treasurer.

Since 2008 has been a member of the Board of the Sarin Group of Companies.

He is also a Justice of the Peace and treasurer of Southern EP Justices Group.



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facebook®



CHAIR REPORT 2018/19

Throughout 2018 and 2019 the Eyre Peninsula Community Foundation has continued its work in supporting communities across the Eyre Peninsula.

The vision of the Foundation is to provide a lasting legacy for future generations on the Eyre Peninsula. We continue to undertake philanthropic activities including building the community endowment, providing grants, and growing our corpus. Our volunteer Directors have continued the positive work of current and previous members of the Board over this past year. The tireless efforts of the Board are to be commended and celebrated, and I thank them for their ongoing support and dedication to supporting their community.

The Board thank the volunteers of the Book Bazaar for their generous donation of their time and efforts. The Book Bazaar, now in its 6th year, has continued as a successful second-hand bookshop, as well as market stalls during cruise ship season. Many members of the community, and many visitors to Port Lincoln have mentioned the wonderful experience they have when they enter the Book Bazaar and share the love of reading books. Book Bazaar profits go to support the Home Hospice Service.

Matthew Flinders Home has provided after-hours care for patients requiring end of life support at home since the service became operation in 2017. This partnership with EPCF providing funds and Matthew Flinders Home providing care, has continued to be an innovative palliative care service in action. Many local families have benefitted from the service in the last year. We look forward to continuing this partnership to support our local community.

In 2019, the Education Fund was able to assist 3 regional students as they commence their tertiary education in Adelaide at University. Back to School Vouchers and Community Grants have also continued to enable us to inform the Eyre Peninsula community about the Foundation, and how we can provide support. This work will be continued on into the future and new projects added as they present as opportunities to support communities.

The staff at the Regional Development Eyre Peninsula office in Port Lincoln have provided ongoing generous support and provision of workspace and resources for administration of the foundation.

I thank you all for your ongoing commitment to supporting our local community.

Majella Mrdjen
Chair
Eyre Peninsula Community Foundation

PARTNERSHIPS & PROJECTS



BOARD OF DIRECTORS 2018/19



Chair— Majella Mrdjen

Born in Adelaide and raised in Port Lincoln, Majella has spent over 15 years living on the Eyre Peninsula. Majella completed her schooling at St Joseph's School in Port Lincoln, and went on to pursue a Bachelor of Speech Pathology at Flinders University in Adelaide. Majella has enjoyed work roles as a speech pathologist within education, health, early childhood and community sectors, and through these roles has travelled to regional and rural areas of the Eyre Peninsula. With a keen interest in travel and languages, Majella participated in the Port Lincoln/Muroto Delegation in 2009 and has continued to foster friendships with members of the Muroto community. Majella is an active member and past president of the Young Tradespeople and Professionals (YTAP) group of Port Lincoln, and has a passion for welcoming and supporting fellow young skilled workers to join the Eyre Peninsula community.

Director since November 2016



Deputy Chair – Garry Downey

Having lived on Eyre Peninsula for over 20 years I have a deep affinity, affection and commitment in ensuring our region remains resilient and robust and a wonderful place to live, work and enjoy the Eyre Peninsula. Long term experience in banking, small business ownership, community sector management and currently working within the Justice system provides me with a diversity of skills that complements other board members. I have been involved with a number of community organisations on Eyre Peninsula including the Port Lincoln Football League Umpires Association, Port Lincoln Primary School Governing Council, Mortlock Shield and in previous times the Community Builders program in Streaky Bay and Regional Coordinator for Mentoring EP and Wheels in Motion.

Director since November 2013



Director - Peter Knife

After an initial seven years in Civil Engineering, Peter joined the embryonic IT industry in 1976 as a programmer. His extensive software experience includes 18 years in the hospitality industry, two years with Macquarie Bank and 14 years in the advertising industry. Raised in Swan Hill, he has lived most of his life on the East Coast and for six years in the USA. He and his wife Margaret fulfilled a long-held ambition to move to Port Lincoln at the beginning of 2010. Peter is President of the Eyre Peninsula Railway Preservation Society, and has published a history of the railways on Eyre Peninsula. He takes a keen interest in issues affecting Eyre Peninsula, especially transport and water. He retired in 2014.

Director since October 2015



Director - Ken Maynard

Director since July 2016

Ken was born in Adelaide and raised in Clare; Ken was employed in the health industry for nearly 40 years in various roles culminating in undertaking the role of Chief Executive Officer, for the Ceduna and Districts Health Service. Along life's journey Ken has been involved with many organisations and sporting bodies including Apex, Whyalla Hockey Association, Ceduna Bowls Club, Thevenard Sports and Community Club, Ceduna Community Radio, Red Cross Volunteer, Thevenard Residents and Rate Payers Group, Commissioner for Far West Football League, Member of the Ceduna Health Advisory Council, and served two terms as an elected member of the District Council of Ceduna.



Director — Margaret Knife

Director since August 2016

Margaret (Maggie) was born and raised in Melbourne, spending most of her adult life in Sydney. She worked in administrative roles for accountants, stockbrokers and financial planners over a period of more than 45 years in Melbourne, Sydney and Port Lincoln, retiring in early 2016. Over the years, Maggie has been an office-bearer with the support groups of the Girl Guides and various school auxiliaries and was the volunteer co-ordinator for a home therapy program for a brain-injured child in Sydney. Since moving to Port Lincoln in early 2010 she has been the Treasurer of the Eyre Peninsula Railway Preservation Society.



Director — Barbara Schmidt

Director since June 2018

Barbara has retired from the challenging world of Agricultural Merchandise Retailing and now enjoys the quiet life of farming with husband David on their 1500-acre farm at Kimba where she spends a lot of time with her six grandchildren and horses. She volunteers for local organisations and supports many clubs, cooking for cake stalls and selling raffle tickets etc and has recently been awarded Life Membership of the Kimba Racing Club. Barbara and David have now appointed a Manager for their business at Kimba and are still shareholders and sit on the Board of Directors for two other retail outlets spread across EP. Barbara attended schools at Ungarra, Lock and Port Lincoln and then nursed at Cleve and Whyalla, graduating as a Registered Nurse in 1974. After working as a Theatre Sister for two years she and David moved to Kimba and set up their business in 1976, firstly as a Spare Parts, Tyre and Battery Outlet, then progressing onto Agchem and Fertiliser in 1986. They became shareholders of a corporate buying group and travelled extensively throughout Australia and sometimes overseas attending field days, conferences and seminars, where they were often recognised for their commitment and achievements with many state awards. Barbara is passionate about the wellbeing of the Kimba Community where the population is declining and farming is becoming more challenging. Businesses are struggling and service groups are battling with fewer volunteers and there is a lack of employment for the local school leavers.



Leonie Wanklyn

Director since October 2018

Born in Leigh Creek Leonie was raised in Mount Gambier until leaving to attend Teachers College in Adelaide. Leonie graduated and began her teaching career at Point Pearce Aboriginal School on Yorke Peninsula before being transferred to Port Lincoln in 1977. Marrying and raising a family in Port Lincoln Leonie has continued to enjoy teaching and completed a Masters of Education/ Studies of Asia through Flinders University. She is currently teaching an Indonesian Languages/ Studies of Asia role at Port Lincoln Junior Primary School and keen to broaden the horizons of young students. Through caring for family members as they travel through the aging process Leonie has firsthand experience and knowledge of care packages, Palliative Care, Eyre Peninsula Home Hospice Service and other services available on the Eyre Peninsula, and an interest in Grants and Programmes that the Eyre Peninsula Community Foundation offers and supports.



Director – Megan Pobke

Director since February 2013

Resigned - October 2018



Chair & Director - Dr Janene Piip

Director since April 2013

Resigned—November 2018



Director—Terri Christensen

Director since April 2018

Resigned—December 2018



Director — Colin Gamble

Director since April 2018

Resigned—December 2018



STATEMENT OF DECLARATION

2018/19

The Board of the Eyre Peninsula Community Foundation Inc [EPCF] declares the following in accordance with the Associations Incorporation Act 1985 [Act]:

- [1] The accounts present fairly the results of the operations of the EPCF for the 2018/19 financial year and the state of affairs of the EPCF as at the end of the 2018/19 financial year.
- [2] The Board has reasonable grounds to believe that the EPCF will be able to pay its debts as, and when, they fall due.
- [3] That no Board Member of the EPCF or a firm of which any Board Member is a member or a body corporate in which the Board Member has a substantial financial interest has received or become entitled to receive a benefit as a result of a contract between the Board Member, firm or body corporate and the EPCF.
- [4] That during the 2018/19 financial year no Board Member of the EPCF has received directly or indirectly from the RDAWEP any payment or other benefit of a pecuniary value.

NAME	MEETING/TRAVEL ALLOWANCE \$	HONORARIUM \$
Majella Mrdjen Chair from December 2018	0	0
Garry Downey Deputy Chair from December 2018	0	0
Peter Knife	0	0
Ken Maynard	0	0
Margaret Knife	0	0
Barbara Schmidt	0	0
Leonie Wanklyn From October 2018	0	0
Megan Pobke Till October 2018	0	0
Dr Janene Piip Chair till AGM November 2018	0	0
Terri Christenson Till December 2018	0	0
Colin Gamble Till December 2018	0	0

Signed: *M. Mrdjen*
Majella Mrdjen – CHAIRPERSON
Date: **20/11/19**

Signed: *S. L. Hooker*
Susan Hooker – Administration Officer
Date: **20/11/19**

NAMED FUNDS 2018/19



The Rotary Club of Port Lincoln established the Port Lincoln Rotary Fire Infrastructure Fund with a contribution of \$25,000 in March 2012. This is to support a whole of region disaster response or preparedness associated with bushfire.

Cummins District
Community Bank Branch  **Bendigo Bank**

The Cummins Community Future Fund was established by the Cummins District Financial Service Ltd with a contribution of \$25,000 in June 2012. Contributions of \$15,000 in June 2013, and \$10,000 in June 2014.

THEMED FUNDS 2018/19

The Eyre Peninsula Home Hospice Fund was established in 2013



Sharyn White (Country Health SA) with Margaret & Peter Knife and the portable bed donated by EPCF to assist the Home Hospice Service

**Majella Mrdjen & Mike McKeown
MOU Signing**

Permanent Home Hospice Service for Eyre Peninsula Continues

A Memorandum of Understanding was re-signed in 2019 between the Eyre Peninsula Community Foundation (EPCF) and Matthew Flinders Homes (MFH). This partnership establishes a permanent Home Hospice Service on Eyre Peninsula, providing out of hours and weekend support to terminally ill patients to allow them to remain in their own homes for their last few weeks.

The Eyre Peninsula Community Foundation managed and invested the funds donated for the home hospice trial, and continues to fill that role for the permanent service. MFH provide the “front line” services under the guidance of an oversight team of associated professionals, with representatives from the EPCF and MFH Boards.

Many generous corporate, businesses, individuals and Eyre Peninsula Book Bazaar donated funds to the Home Hospice Fund.

Careers in the Region was established in 2013



The Eyre Peninsula Education Fund was established in 2016

**Education Scholarship Recipients
Lily Matena, Olivia Dunn & Olivia Murray**



**Eyre Peninsula Community Foundation Caledonian Award for Academic Excellence 2018
Alleigh Hamnet with Chief Roger Inglis**



The Eyre Peninsula Palliative Care Support Fund was established in 2018



SUB-FUNDS INFORMATION

Sub-Funds can be established by donors in either the EPCF Trust or EPCF General Fund depending on whether a tax deduction is being claimed. Sub-Funds can be Named and/or Themed Funds. Donations are invested with other trust funds, but grants made from the donations are acknowledged as being made by the Named or Themed Fund. The original donation is never spent, but keeps on giving to the community long after the money or asset was donated.

NAMED FUNDS

A Named Fund is a special sub-fund that carries a name for the purpose of honouring someone or something and preserving their memory. The sub-fund can carry the name of the donor, the donor's family, a family member, a friend, a local pioneer, an outstanding citizen or an organisation. A Named Fund with the Eyre Peninsula Community Foundation is a cost-effective alternative to a Private Ancillary Fund (PAF) set up by the donor as defined under Australian Taxation law.

In a Named Fund:

Funds are referenced and acknowledged in the name specified by the donor.

The fund is named when the first donation is received.

The minimum contribution can be made over a period of years.*

Donors may if they wish participate in some aspects of sub-fund management (*see Sub-Fund Advisory Committees information below*).

Ongoing contributions, whilst not essential, are recommended at least for a few years.

Donations to the fund are tax deductible in some circumstances.**

Named Fund donors are able to be involved in presenting grants from the fund if they wish.

The Named Fund continues in perpetuity, even after the donor's passing.

Donors may also indicate a preference that a particular group or type of eligible project is to benefit from their donation by including a theme (*see Themed Funds*).

THEMED FUNDS

A Themed Fund is established for the purpose of directing grants into a specific area of community need as preferred by the donor (typical examples of themes include education, home hospice and sporting facilities).

The Foundation may already have a Themed Fund set up for the donor's desired theme. In that case donations may be made to the existing fund and the minimum contribution requirements do not apply to the new donor.

Donations to Themed Funds are invested with other trust funds, but grants made from the donation are acknowledged as being made from the Themed Fund.

In a Themed Fund:

The fund has a theme title which is used when grants are made from the fund.

The minimum contribution can be made over a period of years.***

Donors may if they wish participate in some aspects of sub-fund management (*see Sub-Fund Advisory Committees information below*).

Ongoing contributions, whilst not essential, are recommended at least for a few years.

Donations to the fund are tax deductible in some circumstances.**

The Themed Fund continues in perpetuity, even after the donor's passing.

SUB-FUND ADVISORY COMMITTEES

Donors who create Named or Themed Funds may establish Advisory Committees for their funds (which may comprise the donor alone or several persons appointed by the donor) to work on various aspects of sub-fund management, from establishing grant making guidelines and encouraging donations through to identifying, assessing and choosing grant opportunities. Advisory Committees may provide advice to the Trustee and make suggestions regarding the distribution of grants from sub-funds; however donors and Advisory Committees need to be mindful of the legislative restrictions that apply to charitable trusts – i.e. grant-making decisions must always remain within the discretion of the Trustee.

SUB-FUNDS POLICY

The Board will review sub-funds with a balance of less than \$20,000 annually. If the EPCF has received no donations or communication in relation to a sub-fund for a two year period the trustee may decide to meet with the donor to ascertain their intentions with a view to the funds being rolled into the Trust or General Fund and being made available for EPCF funding priorities as the Trustee decides.

A donor can also request the closure of a sub-fund and granting of the balance. Sub-funds with balances under \$20,000 will be encouraged to distribute the balance to the Trust or General Fund.

We are happy to discuss this or any other options with you confidentially and totally obligation free.

** The minimum contribution to a Named Fund is \$50,000 with an initial donation of \$10,000 and the balance to be received within five years.*

*** Where tax deductible gifts are received, conditions can apply limiting certain grant options. Bequests (gifts of money or property made under a will) are not tax deductible.*

**** The minimum contribution to a Themed Fund is \$50,000 with an initial donation of \$5,000 building to \$20,000 within 3 years and the balance to be received within five years.*

HOW TO SUPPORT THE FOUNDATION

BEQUESTS

Make a bequest to EPCF in your will. It can be acknowledged or anonymous.

This would be an enduring gift to the Eyre Peninsula Community Foundation and may be as simple as adding a codicil to your will (please seek advice from your solicitor)

Why not forever?
The power of a bequest.

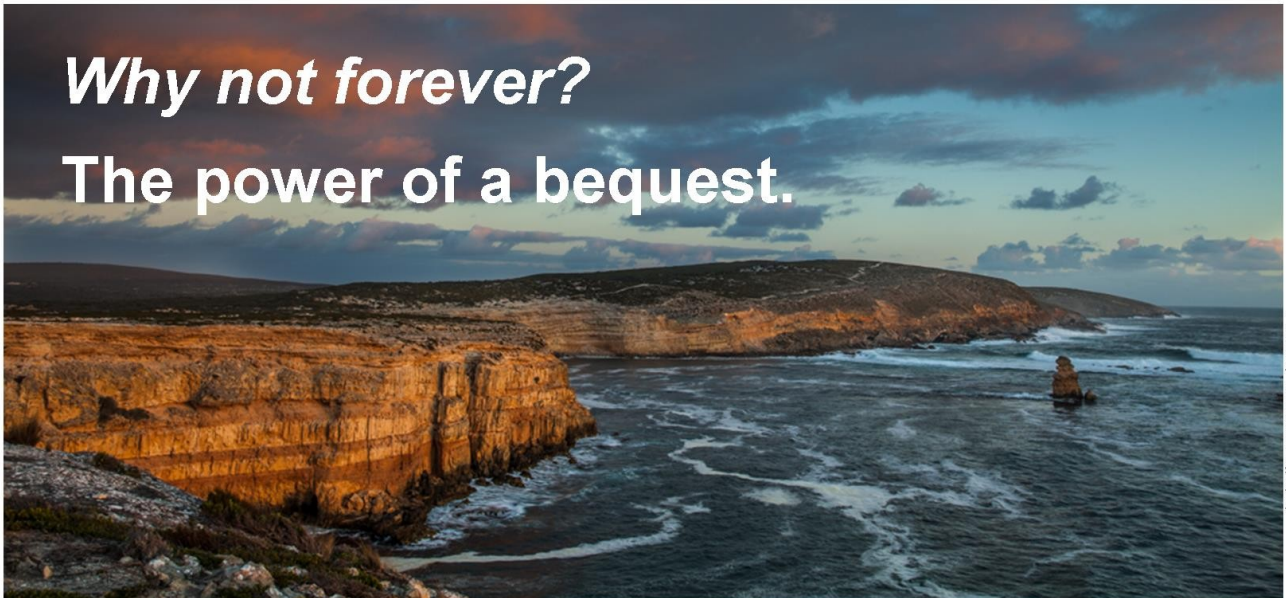


Photo by Take 2 Photography



Our community's future.....
What inspires you?

HOW TO SUPPORT THE FOUNDATION

BECOME A DONOR

The Foundation is different from most other charitable organisations. The donation you make becomes the capital and the funds are invested with an emphasis on security and under the guidance of professional advisers.

The income earned from investing your donation is distributed to the Eyre Peninsula community, and will continue to generate an income for distribution forever. The Foundation is available for donors who wish to "Give where they Live" and assist charitable organisations and projects with no entry or establishment cost.

GIFT OPTIONS

Donors are encouraged to make their gifts in a number of ways depending on their aims:

UNRESTRICTED OR DISCRETIONARY GIFTS

Able to be used by EPCF to make a wide range of charitable purpose grants

WORKPLACE GIVING

Simple and effective way for business and employees to engage with the community and make an ongoing valuable contribution.

BEYOND BANK

Open a Beyond Bank Community Reward Account and designate your rewards to the Eyre Peninsula Community Foundation

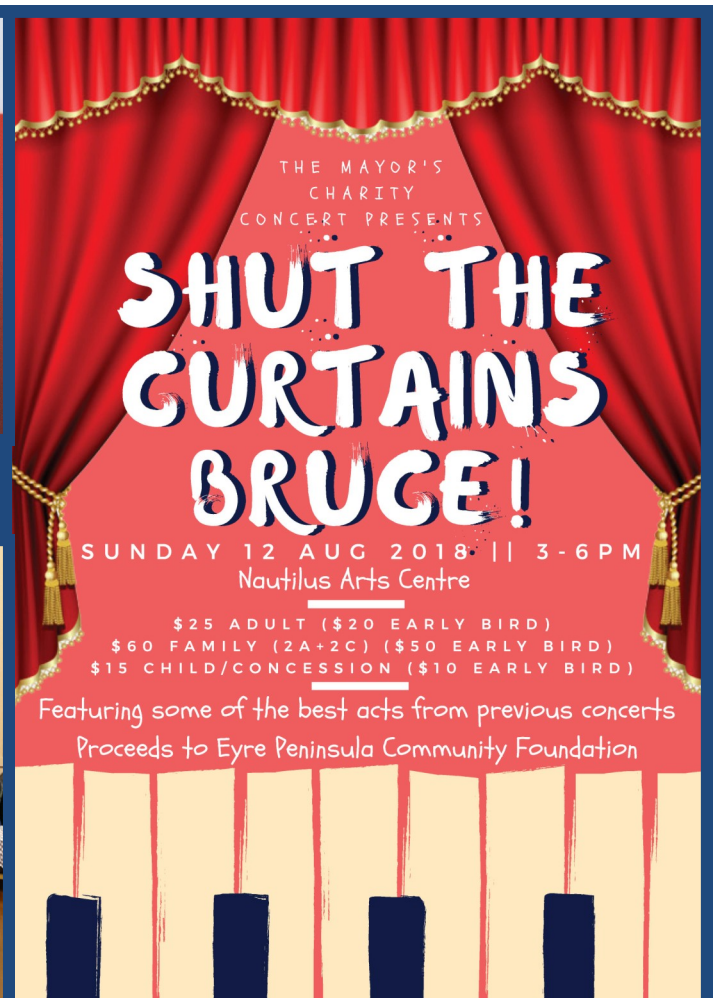
NATIONAL GROWER NUMBER

Make a donation to the Eyre Peninsula Community Foundation from your harvest.

HOST AN EVENT

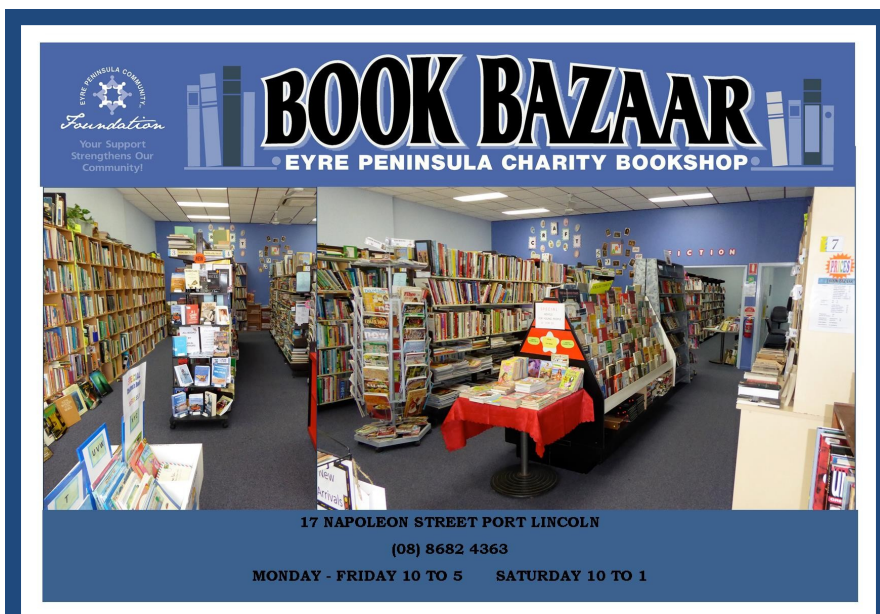


Donation from Port Lincoln Lions Club to the EP Disaster Fund, July 2018



BOOK BAZAAR 2018/19

The Eyre Peninsula Community Foundation's Charity Bookshop Book Bazaar is at 17 Napoleon Street Port Lincoln. The Book Bazaar accepts donations of books, in good clean condition, DVD's, CDs, LP's, games and puzzles for resale. Local Eyre Peninsula published authors books are also for sale at the Book Bazaar. Thanks to everyone who volunteered at the Book Bazaar in 2018/19. Thanks to Rob Watson & Staff at Doug Watsons Mensland for assisting the Book Bazaar through 2018/19. The Book Bazaar celebrated its 6th Birthday in April 2019.



Garry Downey with Todd George



Ken Maynard with Andrew Gravestocks

Back to School Vouchers February 2019

Eyre Peninsula Community Foundation Directors distributed Back to School Vouchers around the Eyre Peninsula. The total value for 2019 was \$33,700.00.

The Eyre Peninsula Community Foundation, in conjunction with the Foundation for Rural and Regional Renewal (FRRR); have assisted the Eyre Peninsula with Back to School Vouchers to date valued at \$201,300.00

Each voucher is a Target Card for \$50 which helps families in need to be able to purchase items for their school aged children to assist them starting the new school year.

Vouchers are commonly used by families to buy clothing, footwear, school bags, stationery items and other equipment students' use at school

The need for this support across the Eyre Peninsula is strikingly high. In gathering data to assist the Eyre Peninsula Community Foundation to achieve distribution, we found that there is a much greater need for this assistance than the support we could provide.

Without the support of School Principals & Governing Councils this distribution would not be possible

People wishing to gain information about the Foundation and options for making donations to assist your school community can access information from the Foundation's Website www.epcf.com.au or Email admin@epcf.com or call 0400 685 520

COMMUNITY GRANTS 2018

RECIPIENTS

Friends of Brinkworth Reserve – Welcome interpretive sign

Ports Football & Netball – Champions Academy

Koongawa Sporting Body – Development coaching

White Flat Hall Committee – Chairs for hall

Elliston Community Sports Centre – ‘Let’s be safe in Elliston’ project



Barbara Schmidt at Koongawa with Eddy & Joshua Bienie

Friends of Brinkworth Reserve Mary Crawford and Peter Southam with Dr Janene Piip



White Flat Hall Committee Member Paula Norton and Dr Janene Piip



White Flat Hall—Chairs

The Eyre Peninsula Community Foundation (EPCF)

belongs to the people of Eyre Peninsula.

It is your LOCAL Community Foundation.

“By donating to the Eyre Peninsula Community Foundation you will be keeping your donation LOCAL for LOCAL benefit.”

**How YOU Can Help Make a Long Term Difference
“Give where you Live”**

The Eyre Peninsula Community Foundation encourages individuals and corporate donors to make donations to the Foundation so that the capital they donate is retained in the Eyre Peninsula region and the income is used to meet the needs of the local communities.

www.epcf.com.au or admin@epcf.com.au

Collections for Charitable Purposes

Section 6 Licence *Collections for Charitable Purposes Act 1939 Section 11(3)*

The Trustee for the Eyre Peninsula Community Foundation General Fund

Licence No: CCP 2650

Eyre Peninsula Disaster Fund

Licence No: CCP 2651

The Trustee for Eyre Peninsula Community Foundation Trust

Licence No: CCP 2652

ACNC

AUSTRALIAN CHARITIES & NOT FOR PROFIT COMMISSION

The Federal Government has established the Australian Charities and Not-for-Profit Commission. All Community Foundations including the Eyre Peninsula Community Foundation report annually.

www.epcf.com.au or admin@epcf.com.au



EYRE PENINSULA COMMUNITY FOUNDATION

TREASURER'S REPORT 2018/19

Total funds under management at year end amounted to \$562,038 (last year \$579,561).

Assets held at year end were:

Cash and bank accounts \$74,916

Bank Term deposits \$315,346

Listed shares \$171,308

The shares performed well again during the year, increasing in value by \$24,552 and generating \$9,719 in dividends. These investments are in blue chip shares and exchange traded funds and are held long term to provide income for distribution, however the steady erosion of interest rates has resulted in a challenging investment environment. In early 2019 the Board engaged a licensed Financial Advisor to assist in preparation of an investment strategy, and the changes related to that strategy are being implemented in the 2019/20 financial year.

The main income and expense items for the year were:

Donations received \$21,503

Investment income \$18,620

Book Bazaar profit after expenses \$30,162

Grants made to local groups \$77,867

Running costs (salaries/audit fees etc.) \$23,187

The Foundation now has five sub-funds, with final balances as follows:

Cummins Community Future Fund \$52,195

Port Lincoln Rotary Disaster Fund \$28,715

EP Home Hospice Fund \$154,492

Palliative Care Support Fund \$5,372

Education Fund \$13,758

The largest component of the grants expense (\$59,822) was for the Home Hospice Service, operating smoothly now under our agreement with Matthew Flinders Homes Inc. The balance of the Home Hospice sub-fund decreased \$33,415 for the year, which reflects the increased activity and the importance of the service for the community.

Peter Knife

Co-Treasurer

