

ANNUAL

IMPACT REPORT



2024

2023 - 2028 STRATEGY

PURPOSE

To invest in building a strong, healthy and diverse community that knows how to get things done and knows how to support themselves, each other and our environment. To help our local community groups to thrive, building a brighter future for Cardinia.

VALUES

Integrity
Commitment
Excellence

OUR FOCUS AREAS

Education	The Environment
Health and Wellbeing	The Arts
Social Cohesion	Crisis Support

STRATEGIC OBJECTIVES

STRONG GOVERNANCE, RISK AND FINANCIAL MANAGEMENT

Ensuring that the Cardinia Foundation complies with trust law and the Corporations Act, as applicable, has the most effective financial and legal structure in place and ensures policies, procedures and requirements are documented.

GRANT PROGRAM

Review guiding principles and key assessment criteria to ensure successful outcomes, as well as meet the Foundation's financial obligations and targets.

BUILDING AWARENESS AND ENGAGEMENT WITH THE FOUNDATION

The Cardinia Foundation's focus is to build its profile as an independent, responsive, trusted and connected part of the Cardinia community, through partnership and collaboration.

BUILDING RELATIONSHIPS WITH BUSINESS AND COMMUNITY

Cardinia Foundation's strategic goal is to partner with local businesses and collaborate with the Cardinia community.

FUNDRAISING DEVELOPMENT

Build the Foundation's funds through an approach that allows both giving in the present and building a capital fund to address future needs.

ACTIONS AND IMPACT

Fundraising for the grant-giving program aligns with the Cardinia Shire Council's Liveability Plan, with the immediate focus of food and housing.

The goal is to build \$20 million in 20 years

This will be achieved by fundraising through:

- Mix of endowments of bequests and donor giving
- Corporate giving
- Workplace giving (payroll giving)
- Event partnerships (Cardinia Foundation as recipient/part recipient)

THE YEAR IN REVIEW

This year we have welcomed Melissa Gleeson as a employee as our Fundraising and Partnership Manager and and three new directors Christine Bailey, Ravi Bhatt and Chris Banbury. Kara Norton-Jones took maternity leave, welcoming a baby boy in May. Kara returned back to work casually in September to help support Melissa and board.

The board engaged with Alan White, an experienced Marketer and Fundraiser in the not-for-profit sector to review our marketing. While we still work to implement the outcomes of the marketing recommendations, we plan to launch our foundation with a fresh new look and name change of the foundation early in 2025.

We held our first partners lunch at Shanika's in March whereby we gained a new Cornerstone Partner, Sunrise2Sunrise. We then held our second lunch at our director Adam's venue at Stella's Kitchen in October where we introduced Our Community Company Ltd as our new Cornerstone partner.

In November we held a Wills and Bequest information session at Pink Hill Hotel in partnership with Falcone and Adams Lawyers and Tina McInerney Funeral Celebrant. This was a great information session whereby people gained good knowledge of wills and funerals.

Melissa and Paul our Chair, attended a 5 days forum in Byron Bay hosted by Community Foundation Australia. This was a great event for learning, connecting and networking, giving the foundation more ideas and great support from other foundations across Australia.

The foundation distributed \$41,031 through our annual Community Grant round in April 2024 and supporting Christmas Together, in total we have assisted 9 local charities. These funds will help over 10,000 people in our community.

While we continue to raise funds through different streams, including Partnerships, Workplace Giving and Bequests, we launched our Named Funds option for individuals, families or businesses can contribute funds to our corpus while being a part of of grants round and having a grant awarded in their name each year. So far we have one Named Fund, Castello's Fund and are working to build this over the next 12 months.

With the continued support for Cardinia Shire Council with funding for wages for FTE roles, Kara Norton-Jones is our current Executive Officer who began in May 2023 and Melissa Gleeson our Fundraising and Partnerships Manager who began in January 2024.



Christine Bailey



Ravi Bhatt



Chris Banbury

CURRENT BOARD MEMBERS

Paul Thomas - Chairman
Simon Dunstan - Vice Chairman
Adam Sadiqzai
Kate Lempriere
Carol Jeffs
Brett Owen

Kristine Ash
Abiola Ajetomobi
Tony Fitzgerald
Christine Bailey
Chris Banbury
Ravi Bhatt

GRANTS 2024

Our grants program focuses on 6 key areas, Education, Health and Wellbeing, Social Cohesion, The Environment, The Arts and Crisis Support.

The panel reviews the grants based on these key areas as well as the demographic location of the projects.

The majority of our grants are awarded to charities that hold a DGR1 status.

A few examples of grants given this year:

PROJECTS	DETAILS	OUTCOME
Pakenham SES	\$10,000 grant to assist with a new rescue truck for Cardinia	SES plays a critical role in maintaining capacity to provide crucial assistance to our community, particularly around storm, flood and building incidents.
Heart Kids	\$7,200 Supporting local fathers	Boosting morale and supporting 52 fathers across Cardinia to enable psychological well-being in those supporting children with Childhood onset Heart Disease.
Rotary Emerald	\$1,000 grant for hosting youth mental health forum in Emerald and online	The forum promoted health professionals and services in our region to assist and support those who need it.

9

Grant recipients from Community Grant June 2024 and Christmas Together 2024

\$41,031

Distribution of funds for 2024

10,000+

Cardinia residents have benefitted from the grants in 2024

ADRA

FRANKIES KITCHEN

HEART KIDS

MOY-YAN

NEIGHBOURHOOD HOUSE

FOODBANK

PAKENHAM SES

PUFFING BILLY TOY

LIBRARY

OAKWOOD SCHOOL

ROTARY EMERALD

THE SALVATION ARMY



FUNDRAISING REPORT

This report highlights the fundraising efforts and achievements experienced during the reporting period.

2023/2024 saw the Foundation raise a total of \$121,986. Whilst the Foundation didn't meet the target for this period, this year showed that there are opportunities for growth in the coming years, especially in Bequests, Partnerships and Work Place Giving.

For the period of 1 July to 30 November 2024, Cardinia Foundation raised a total of \$121,967 with seven months of the financial year to go.

With the introduction of Named Funds to the Partnership portfolio, this new initiative has given another level of sponsorship that appeals to the business community.

We have also partnered with a number of supporting partners who raise funds for the Foundation in a unique way:

- Aligned Leisure raise funds through the registration of their annual Fun Run and coffee with a purpose initiative.
- KR Peters Real Estate donate \$100 for every established house they sell
- MIA Real Estate have committed to donate \$1,000 from every sale of a house established and new.

Cardinia Foundation are deeply grateful to every donor and supporter who has contributed to our mission. Their support fuels our work and gives hope to those we serve. As we look ahead, we invite our community to continue partnering with us. Together, we can make the coming year even more impactful.

Thank you for your ongoing support and for being part of this remarkable journey. Let's keep the momentum going and achieve even greater milestones in the year ahead.

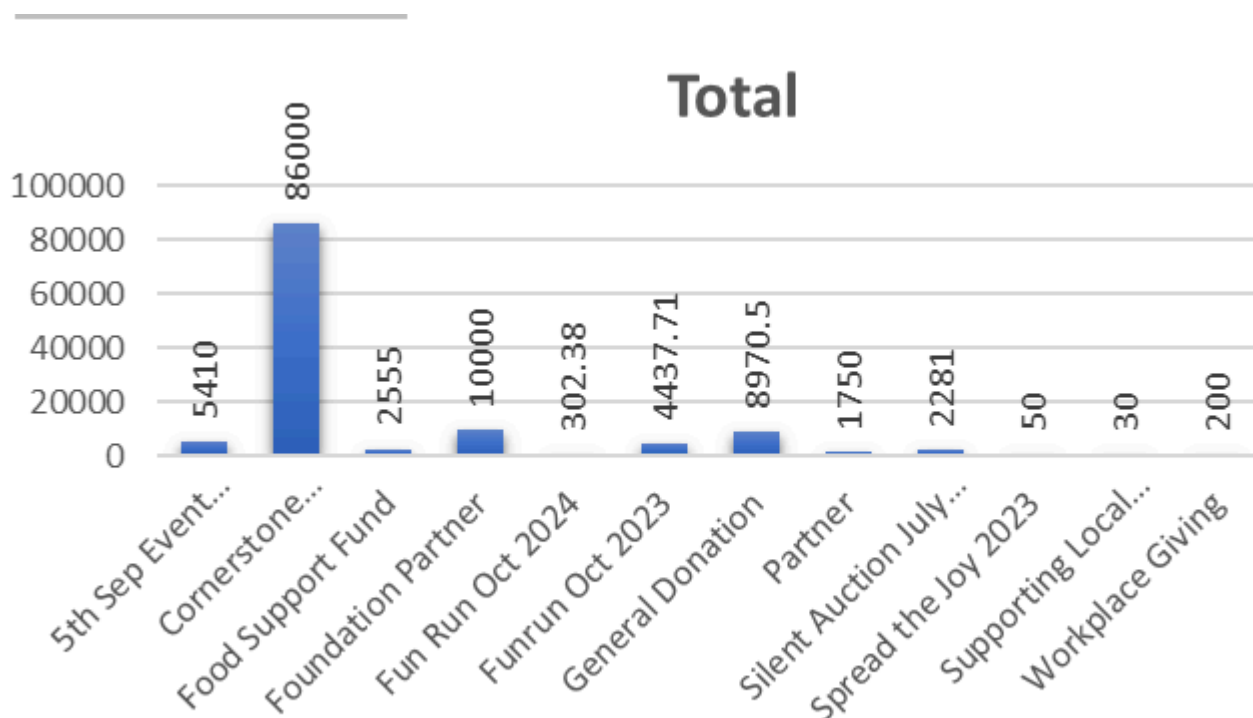


FUNDRAISING

TARGET 2023 - 2024

Fundraising **\$800,000** Achieved 2023/24 **\$121,986**

Bequests **2**



TOTAL FUNDRAISING

Total **\$121,986**

PARTNERS

Cornerstone **\$86,000**

Foundation **\$10,000**

Partner **\$1,750**

FUNDRAISING

TARGET 2024 - 2025

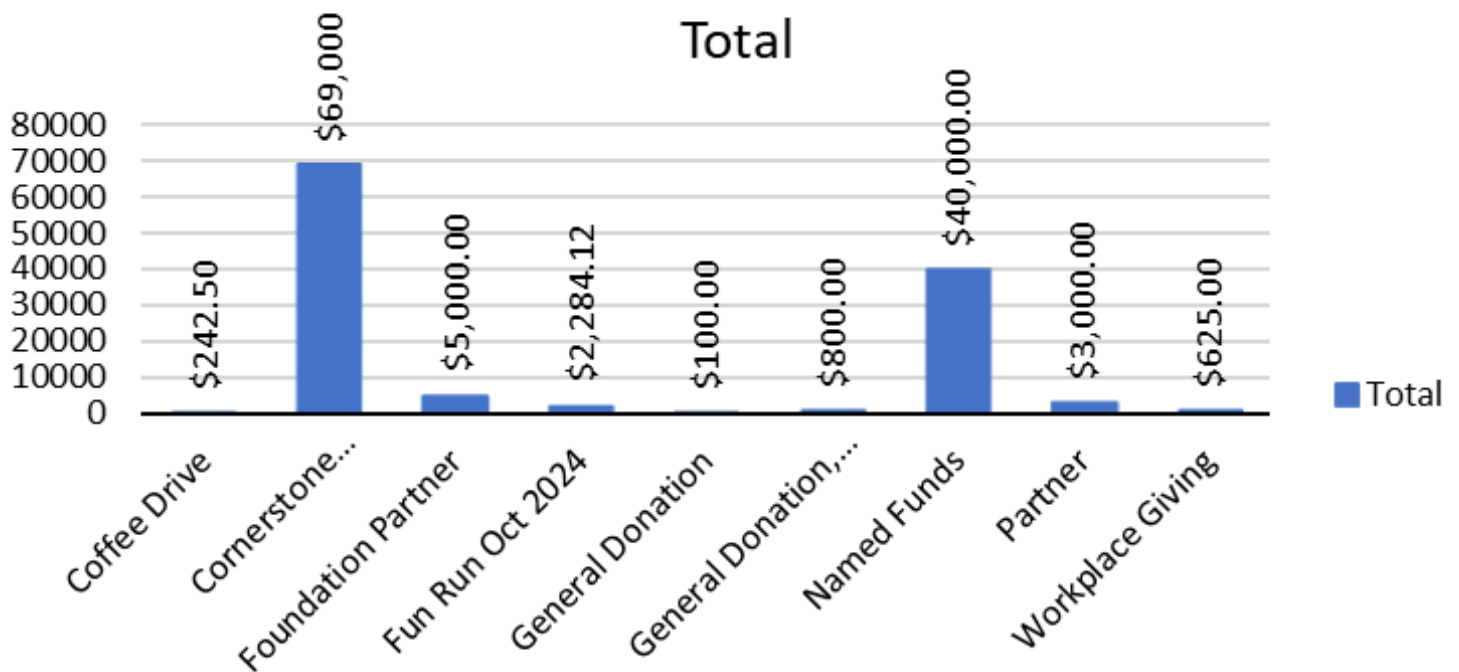
Fundraising **\$800,000**

Achieved Dec 2023

\$121,967

Bequests

3



TOTAL FUNDRAISING

Total

\$121,967

PARTNERS

Cornerstone

\$69,000

Foundation

\$5,000

Named Funds

\$40,000

Partner

\$2,100

ACKNOWLEDGEMENT

We'd like to thank all our donors and partners for their generous support.

CORNERSTONE PARTNER



Sustained Quality Care



FOUNDATION PARTNER



SUPPORTING PARTNER



PARTNER

