

Contents

Smarter Giving. Greater Impact.

Helping you make a difference

2

Structuring your giving

Tailored services for your giving

Our giving community

Making change together: Impact Fund

100% responsible investing

Leaving a lasting legacy

Leadership and governance

Get started with Smarter Giving

Australian Communities Foundation acknowledges Aboriginal and Torres Strait Islander peoples as the first inhabitants and Traditional Custodians of the lands on which we live and work. We pay our respects to all Elders past and present.

Image: Members of our giving community gather on the northern bank of the Birrarung / Yarra River, Naarm/ Melbourne for a smoking ceremony to open our Voices for Impact program, dedicated to supporting First Nations leaders.





Australian Communities Foundation enables and inspires smarter giving for greater impact.

Australian Communities Foundation is a nonprofit organisation that supports and enables smart, rewarding and effective giving. With more than 25 years of experience in catalysing positive social and environmental change, we make impactful philanthropy easy and accessible.

As Australia's only national community foundation, we are a community of givers made up of thousands of people from all over the country. What unites us is our desire to make a difference.

OUR PURPOSE

To activate a nation of givers to create a fairer and more sustainable Australia.

OUR ROLE

As a broker of change, we enable, support and amplify giving. We connect those who can give with those making positive change.

OUR VALUES

As we work towards a fairer and more sustainable Australia, we are guided by four underlying values: inclusion, agency, courage and fairness.

FOCUS AREAS

At Australian Communities Foundation, you can give to the causes and organisations of your choosing. As a Foundation, we track our impact across five focus areas:

Tackling Inequality

Safeguarding the Environment

Supporting First Nations Self-Determination

Strengthening Democracy

Building a Culturally Vibrant Society

See pg. 13 for our community's top giving areas.

Why give with us?

We make giving easy and effective

We're experts in all the work that comes with giving: administration, compliance, grantmaking and more. Give with us so you can focus on the joy and impact of your giving.

We have deep roots in community

We work with hundreds of grassroots organisations and leaders to identify community needs and opportunities so you can give with impact.

We connect you with community

When you give with us, you join a national community of like-minded givers and gain access to networking and learning events, plus cofunding opportunities that maximise your impact.

We support tax-effective giving

We offer ways to structure your giving so you receive your tax deduction now and the flexibility to support your causes when you're ready.

We grow your giving and impact

When you open a Fund with us, your donations are responsibly invested, meaning your money can both grow and do good while you take the time to find the right opportunities for granting.

We honour your legacy

When you leave a bequest through us, you can create a lasting legacy. Your gift can be invested and grown into an ongoing source of funding for communities.

Helping you make a difference



Andrew BinnsChief Executive Officer

At Australian Communities Foundation, we help people and organisations make a difference through structured giving, also known as philanthropy.

Structured giving uses a vehicle such as a public ancillary fund (like our Foundation), private foundation, bequest or legacy trust to help you take control of your giving.

This enables you to target your giving over the long term to make a positive impact on the issues that matter most to you.

As a community foundation, we bring together givers from all walks of life. Community foundations are the fastest growing form of philanthropy around the world – and there's good reason.

Community foundations are independent, not-for-profit organisations that help build and strengthen communities through giving. Rather than supporting any single cause, community foundations help people invest in the causes they care about.

Read on to learn how we can support your giving as Australia's only national community foundation.

The difference a structure can make to your giving

1. Give now, grant later

Receive the tax deduction now; decide where you would like to give at a time that's right for you.

2. Philanthropic expertise

Ensure your giving achieves maximum impact with support from our team and our deep connections to organisations serving our communities.

3. Create a lasting legacy

Get future generations involved or establish a meaningful family legacy that can be passed down.

4. Engage others in your giving

Enhance the engagement of your staff, clients, stakeholders, friends and supporters. Use our online donations system and nationwide fundraising licences to raise money for your cause.

5. Be part of a community

Be part of a thriving community of givers at Australian Communities Foundation, with support and access to events, connections to like-minded donors, and regular giving inspiration targeted to your interest areas.



What we offer

Structures

There are several ways you can structure your giving. Structures we offer include:

GUMNUT ACCOUNT

A starter account that is managed within our Foundation that you grow into your Named Fund

NAMED FUND

A giving account within our Foundation with all compliance and grants management covered + 100% responsible investing

PRIVATE FOUNDATION

A stand-alone trust with its own governance structure and investment strategy

ACF Advisory

Building on our long track record of strategic giving, we offer a range of philanthropic solutions and services through ACF Advisory.

PHILANTHROPIC SERVICES

Philanthropic strategy, grantmaking, grant rounds and scholarships

FOUNDATION SUPPORT SERVICES

Services for trusts and foundations spanning compliance and administrative support, including tailored packages for Private Foundations

STRUCTURE ADVICE AND DESIGN

Support with identifying and establishing the right giving structure for a range of circumstances

Community

When you structure your giving with us or engage our services, you join Australia's largest community of everyday philanthropists and gain access to:

GIVING IDEAS AND INSPIRATION

Regular updates including giving ideas aligned with your interest areas, impact insights and stories

EVENTS AND LEARNING CIRCLES

Opportunities to meet and learn from like-minded donors and changemakers

CO-FUNDING OPPORTUNITIES

Opportunities to give together with like-minded donors and maximise your impact

Structuring your giving



Olivia Clark-Moffatt Director of Engagement & Advisory

Simplify your giving and maximise your impact with a Named Fund or Private Foundation.

EFFECTIVE OPTIONS FOR FAMILIES + INDIVIDUALS



Named Funds OR DONOR-ADVISED FUNDS

Establishing a Named Fund is an easy, tax-effective and strategic way to support the causes you care about.

When you open a Named Fund with us, we take care of the administration and compliance, leaving you free to focus on the joy of giving.

Grants can be made from your Named Fund at any time to the charitable organisations of your choice.

You can make additional donations at any time, invite others to contribute through our online Donations Portal, and undertake fundraising activities using our nationwide licences.

Donations into your Named Fund are 100 per cent responsibly invested.

Just getting started on your giving journey? Grow a Named Fund with a Gumnut Account – see pg. 9.



Private FoundationsOR PRIVATE ANCILLARY FUNDS

For those looking to enjoy the benefits of a community foundation while retaining the independence of their own foundation, we can support you to set up a Private Foundation.

A Private Foundation (otherwise known as a private ancillary fund or PAF) can be an attractive option for anyone who wants to be actively involved in the governance of their giving vehicle, including investment management.

In addition to support with establishment, we provide ongoing assistance through ACF Advisory – see pg. 11.

SUPPORT FOR PROFESSIONAL ADVISORS

Are you a professional advisor? We can work with you to provide the structure, services and community to support your clients' giving. We also offer solutions for you and your team to upskill in structured giving. Contact us for a conversation about taking your service offering to the next level.

SPOTLIGHT:

FAMILY FUND

Melbourne-based donors Anne Thompson and Paul O'Shea are passionate about social justice with a long history of volunteering.

Anne and Paul support a range of causes and organisations through their Named Fund, ranging from large national charities, such as The Smith Family, to smaller not-for-profit organisations like Melbourne's Woor-Dungin, a not-for-profit that connects Aboriginal-led organisations with philanthropic partners. Anne and Paul believe more Australians could be involved in "really rewarding" philanthropy.

"Australian Communities Foundation does a fantastic job of putting structure around our giving, keeping us informed and doing a lot of the backroom work. And then you do get satisfaction because the causes that they bring to our attention really hit the spot as far as we're concerned."

How it works: Give, grow, grant



Structure your giving through a Fund or **Foundation**



Your donations are invested and can grow



Your funds become an ongoing source of support for communities

SPOTLIGHT: PRIVATE FOUNDATION

Ondine Spitzer and Hugh Belfrage are on an ambitious giving journey to alleviate the housing affordability and accessibility crisis in Australia.

Using Australian Communities Foundation's experience and expertise, Ondine and Hugh recently established the V&F Housing Enterprise Foundation. Hugh and Ondine agreed early on that targeting a single, fundamental issue in a structured way with their giving was preferable to making ad hoc donations to a range of causes. After researching different philanthropic structures, the pair opted to establish a private ancillary fund.

"Australian Communities Foundation helped us set everything up administratively and legally – it's been a very

> positive experience," Ondine says. "We came back to the Foundation to talk about getting regular and ongoing support to help set us on our way and that's been instrumental to getting us where we are."





Other Funds tailored to your needs





Corporate and Workplace Funds

Corporate and Workplace Funds enable organisations across Australia to establish and extend their giving programs.

When you open a Corporate Fund with us, whether it is for your company or employees or both, you can start giving without the administrative burden on internal resources. All funds are responsibly invested, and our team can support you to give in line with your organisation's mission and values. Note: Private Foundations are also available to organisations.

SPOTLIGHT: CORPORATE FUNDS

Melbourne-based management consulting firm Nation Partners established a Corporate Fund to extend its existing giving program. "We were at a point in our giving journey where we felt we were ready to bring some structure and strategy to how these resources are used in the future," says Managing Director, Matthew Nation.

Collective Giving Funds

Collective Giving Funds support like-minded groups and giving circles to pool their donations and give together for collective impact.

We take care of all granting administration and compliance, allowing you to focus on the joy of giving together. Our two-week granting cycle means you can distribute grants quickly and responsively. Whether you are holding a fundraising event or seeking payment of recurring membership fees, our online donation services provide quick and easy solutions.

SPOTLIGHT: COLLECTIVE GIVING

Groundswell is Australia's first giving circle dedicated to funding strategic, high-impact climate advocacy and action. "The real power of being part of a giving circle is that we're stronger together," says Groundswell co-founder Clare Ainsworth Herschell. "When you walk that journey in a community it takes away a bit of that overwhelm."

NAMED FUNDS FOR ALL GIVERS

In addition to supporting families and individuals to structure their giving with a Fund or Foundation, we also offer a range of tailored Named Funds.





Future Funds

Future Funds are a low-cost way for not-forprofit organisations to build an endowment for their long-term sustainability.

You gain access to our fundraising and donation infrastructure, and can enjoy investment returns through our pooled ethical investments. Future Funds are also available to individuals, families and other groups looking to support a single organisation.

Scholarship Funds

Scholarship Funds support people to provide payments that give others greater access to education.

When you open a Scholarship Fund, you have the choice of providing educational payments, prizes and bursaries to scholarship-providing charities or directly to students. You can choose an existing scholarship to support or engage our team to assist in designing your own, including its purpose and selection criteria.

SPOTLIGHT: FUTURE FUNDS

Regional Arts Australia works across all states and territories and all art forms. The organisation uses a Future Fund to fundraise and increase its core capacity. Image: Mimili Maku artist Linda Puna celebrating her fashion collaboration with Unreal Fur in her community, recipient of a Regional Arts Fund Grant, managed by Regional Arts Australia on behalf of the Australian Government.

SPOTLIGHT: SCHOLARSHIP FUNDS

When Sydney barrister Joanna Knight passed away at just 36 years old, her family and colleagues established a scholarship in honour of her dedication to social justice. With support from Australian Communities Foundation, the Scholarship Fund is now helping people from diverse backgrounds begin their careers in law.

AUSTRALIAN COMMUNITIES FOUNDATION

Choosing the right option for you

	NAMED FUND	PRIVATE FOUNDATION	
Tax-deductible donations	√ *	✓	
Public donations	✓ -	×	
Time to set up	24 – 48 hours	6 – 12 weeks	
Minimum initial donation	\$10,000	Ideally more than \$1 million	
Granting	Charities with DGR1 status ** Note: Extension Funds can give to any charitable purposes.	Charities with DGR1 status	
Trustee	Australian Communities Foundation Limited	You and the Directors you appoint	
Minimum distribution requirements	None ***	5% of the opening value each financial year	
Investment management	100% responsible investing managed by our advisors	You nominate an investment advisor or manage yourself	
Income tax exempt	✓	✓	
Refunded franking credits	✓	✓	
Anonymity	✓	×	
Access to our online Fund Portal for making donations, requesting grants and reviewing activity	√	×	
Benefits for our community Giving ideas and inspiration Events and Learning Circles Co-funding opportunities	√	Available through Private Foundation Packages	

Visit our website for fee information: communityfoundation.org.au/giving/fees

^{*} Unless you establish your Fund within our Extension Fund to give to non-DGR1 organisations.

^{**} A deductible gift recipient (DGR) is an organisation that can receive donations that are tax deductible.

^{***} No minimum distribution requirements for individual funds. As a public ancillary fund, Australian Communities Foundation must distribute 4% of the opening value of its corpus each year. This is calculated at the consolidated trust fund level, giving you flexibility as needed.





Take your giving to the next level with the broadest range of philanthropic services in Australia.

Olivia Clark-Moffatt
Director of Engagement
& Advisory

Bespoke solutions and services are available to anyone seeking support for their giving, not just those who structure their giving with us.



Philanthropic Services

For individuals, families, small businesses, corporations, trusts and foundations, and professional advisory firms

PHILANTHROPIC STRATEGY

Whether you are starting from scratch or seeking guidance in a specific area, tailored workshops and advice will help you with:

- ✓ Building a strategy from scratch
- Choosing the right structure
- ✓ Navigating regulation, compliance and risk
- Defining your values and motivations
- ✓ Identifying your funding focus and priorities
- Designing your Theory of Change
- Understanding your impact
- ✓ Getting your family involved
- Cause area research

GRANTMAKING SERVICES

- Decision-making frameworks and facilitation
- ✓ Due diligence and compliance
- Grant processing, receipting, impact monitoring and reporting

GRANT ROUNDS + SCHOLARSHIPS

- Program design and development
- Guidelines, form templates, and assessment criteria
- Advertising and promotion
- End-to-end delivery of application and decision-making process
- ✓ Assessment of applications
- Feedback and reporting

Reach out at any time to our ACF Advisory team: **03 9412 0412** or email **advisory@communityfoundation.org.au**





Foundation Support Services

Additional support for trusts and foundations, including tailored packages for Private Foundations (PAFs)

COMPLIANCE

- Preparation of annual accounts and reports
- ✓ Liaising with auditors and investment advisors
- Preparation for and attendance at signing of accounts meeting
- ✓ Quarterly GST compliance
- Cash flow preparation and management
- Lodging Annual Information Statement with ACNC and attending to other ACNC matters

ADMINISTRATION

- Preparation of trustees' papers
- ✓ Attendance at trustees' meetings
- Board meeting preparation, documentation, attendance and follow-up
- Meeting coordination and correspondence on behalf of the foundation
- Other secretarial services including maintenance of files and key documentation

Private Foundation Packages

PACKAGE 1: GRANTING

Bring your giving goals to life in a strategy co-designed with philanthropic experts. Ongoing support ensures you connect with people and ideas to inspire you, plus granting recommendations that maximise your impact.

PACKAGE 2: COMPLIANCE

Enjoy peace of mind knowing that all your administrative obligations are met. Our expert team undertakes all compliance, financial and secretariat services, and regularly reports to your trustees.

FULL PACKAGE

This full-service offering encompasses both Package 1 and 2, helping you achieve both strategic purpose and freedom from the compliance burden, ensuring effective and efficient philanthropy.

Visit our website for package fees: communityfoundation.org.au/giving/fees



Structure Advice and Design

Trying to decide between a donor-advised fund, private ancillary fund (PAF), trust or another structure? We're experts in identifying and establishing the right structure for a range of circumstances, including bespoke giving structures to meet your needs.

Our giving community



Carly Severino
Director of Community
& Philanthropy

When you structure your giving with us or engage our services, you join Australia's largest community of everyday philanthropists.

Our giving community is made up of 600+ funds and foundations created by individuals, families, couples, young professionals, business people, retirees, and everyone in between.

Some of us choose to join together to support key issues and amplify our impact by co-funding initiatives, while some of us prefer to keep our giving personal and private. What unites us is our desire to make a difference and contribute to a fairer and more sustainable Australia.

Benefits for our community

In addition to all the benefits that come with structured giving, our giving community enjoys access to a range of perks that inspire smarter giving.

GIVING IDEAS AND INSPIRATION

Regular updates including giving ideas aligned with your interest areas, impact insights and inspiring stories

EVENTS AND LEARNING CIRCLES

Opportunities to meet and learn from likeminded donors and changemakers, plus access to the Community of Giving space in East Melbourne

CO-FUNDING OPPORTUNITIES

Opportunities to give together with like-minded donors and maximise your impact, including through the Impact Fund

IMPACT FUND

The Impact Fund is our flagship fund tackling the most pressing issues facing our country. When you choose to give through the Impact Fund, you join a national network of 100+ funders and changemakers creating a fairer Australia



At Australian Communities Foundation, we support our community to give effectively to the causes they care about. Since 1997, our community has distributed over 12,000 grants totalling \$180+ million.

EDUCATION, TRAINING + EMPLOYMENT

\$32+ million



ENVIRONMENT, CONSERVATION + CLIMATE CHANGE

\$20+ million



FIRST NATIONS COMMUNITIES

\$30+ million



ARTS + CULTURE

\$20+ million



INDIVIDUAL/FAMILY SERVICES + SUPPORT

\$26+ million



CIVIC ENGAGEMENT + SOCIAL INCLUSION

\$11+ million



HEALTH, WELLBEING + MEDICAL RESEARCH

\$21+ million



INTERNATIONAL AID + DEVELOPMENT

\$7+ million



FOCUS AREAS



TACKLING



SAFEGUARDING THE



SUPPORTING FIRST



STRENGTHENING DEMOCRACY



BUILDING A
CULTURALLY

Images from Grantee Partners: Smiling Mind, Albury Wodonga FoodShare, Grata Fund, Original Power, Cerebral Palsy Alliance, Stella Prize, Many Coloured Sky, and Community Care Kitchen.

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AUSTRALIAN COMMUNITIES FOUNDATION

Making change together: Impact Fund

The Impact Fund is a way for you to get involved in best-practice collective giving. Backed by a growing community of funders and changemakers, the Impact Fund supports the boldest solutions to the biggest issues facing Australia across four Impact Areas:



Tackling Inequality



Safeguarding the Environment



Supporting
First Nations SelfDetermination



Strengthening Democracy

How it works

1.

IDENTIFYING OPPORTUNITIES FOR IMPACT

Each year, our team identifies critical issues of national significance. We look for opportunities where we can have the biggest impact and find the changemakers who will get us there.

2.

SUPPORTING THE WORK

Australian Communities
Foundation commits funding
from the Impact Fund to selected
organisations, which is pooled
with contributions from our
giving community – this is
where you come in.

3.

AMPLIFYING OUR IMPACT

Finally, we leverage our community's support by inviting other foundations to co-fund with us, and together, we maximise our impact.

Become an Impact Funder

Give with the Impact Fund and join a national movement of funders and changemakers creating a fairer and more sustainable Australia.

You can either contribute directly or give alongside the Impact Fund through your own Fund or Foundation.

Contact our team to get involved: **03 9412 0412** or email **grants@communityfoundation.org.au**



\$10M+ 200+

FUNDS RAISED

FUNDERS GIVING TOGETHER 20+

POSITIVE POLICY REFORMS ACHIEVED

10+

GROUPS AND INITIATIVES ESTABLISHED

Here's a snapshot of some of the biggest wins our Impact Fund community has contributed to over the last five years:

- Australia's first coalition for gun safety established
- Marriage equality achieved for all Australians
- Green star rating of new housing builds increased from six to seven stars under the National Construction Code
- ✓ Over \$800 million in government funding secured to support 80 Indigenous ranger groups
- √ 191 refugees and people seeking asylum brought to Australia from offshore detention to access urgent medical care

- Public drunkenness laws that discriminate against Indigenous people decriminalised in Victoria
- ✓ Climate inaction by governments recognised as human rights violation in historic Torres Strait Eight case
- Abortion decriminalised in QLD and NSW, and safe access zone laws defended in VIC and TAS
- Divisive Religious Discrimination Bill that would have wound back anti-discrimination laws shelved indefinitely

Image: Impact Funders first supported the Climate Council in 2017 to build public support for climate solutions such as the transition to renewable energy. Credit: Dean Holland.

100% responsible investing



Daniel Brugaletta Chief Financial & Operations Officer

At Australian Communities Foundation, we put our values at the centre of everything we do, including how we invest pooled philanthropic assets. That is why 100 per cent of the Foundation's investment portfolio is responsibly invested.

When you open a Named Fund, you're part of this positive movement, which has many benefits, including:

1.

Contributing to a stronger, fairer and more sustainable world 2.

Providing both financial and social/ environmental return on investment

3.

Achieving greater strategic alignment across investments and grants

With the support of our investment advisors, Koda Capital, we seek out investments with a strong financial return and a positive social or environmental impact. As part of this approach, we actively contribute to positive outcomes through impact investments aligned with our Impact Areas.



As the first Australian philanthropic foundation to become a signatory to the UN Principles for Responsible Investment, we're proud to increase the impact of your giving by ensuring your philanthropic assets are 100 per cent responsibly invested.*

We've also been named a Responsible Investment Leader by the Responsible Investment Association Australasia two years in a row.





 $^{^{\}ast}$ For those with private foundations, we can connect you to responsible investment advisors.



Leaving a lasting legacy

Leaving a gift in your Will is a powerful way to support the causes you care about for generations to come.

At Australian Communities Foundation, we can help you leave a lasting legacy. One of the key decisions to make is whether you will leave a one-off gift or one that can last forever through a structure like a Named Fund or Private Foundation.

Your own Fund or Foundation: A smarter way to leave a legacy

YOUR CHARITABLE GIFT	ONE-OFF GIFT	FUND OR FOUNDATION
Can make a difference	✓	✓
Can be allocated for specific uses in line with your wishes	✓	✓
Is invested and can last forever		✓
Can support the causes you care about in perpetuity		✓
Is untied from benefiting one organisation		✓



SPOTLIGHT: LEAVING A LEGACY

Writer and academic Dennis Altman recently chose to leave a gift to his Named Fund at Australian Communities Foundation – a decision he made for two reasons.

"First, knowing that it will be invested and grown into an ongoing source of funding for my focus areas makes it a more attractive option than simply leaving a one-off gift to charity," says Dennis.

"Secondly, one of the things I've learnt about good philanthropy is that it should actually aim to have itself replaced. If you're funding a program and it's really good, then I think the state should start funding it. There's been a number I've seen that have been successful in this sense. So perhaps the projects I'm funding today won't need funding tomorrow.

"Knowing that the Foundation will be there to identify new projects aligned with my interests reassures me that I can contribute to progress for future generations."



AUSTRALIAN COMMUNITIES FOUNDATION

Leadership and Governance

Executive Team



Andrew BinnsChief Executive Officer



Carly Severino
Director of Community
& Philanthropy



Olivia Clark-Moffatt Director of Engagement & Advisory



Daniel BrugalettaChief Financial &
Operations Officer

Board of Directors

Australian Communities Foundation is governed by a Board of Directors, who delegate part of their work to specialised committees to ensure that the organisation holds itself to the highest standards.



Fiona McLeay Chair



Penny BurkeChair, Nominations
Committee



Gia Cari



Chris Croker



Adam Milgrom Chair, Investment Committee



Glen Noonan Chair, Finance Risk Audit & IT Committee



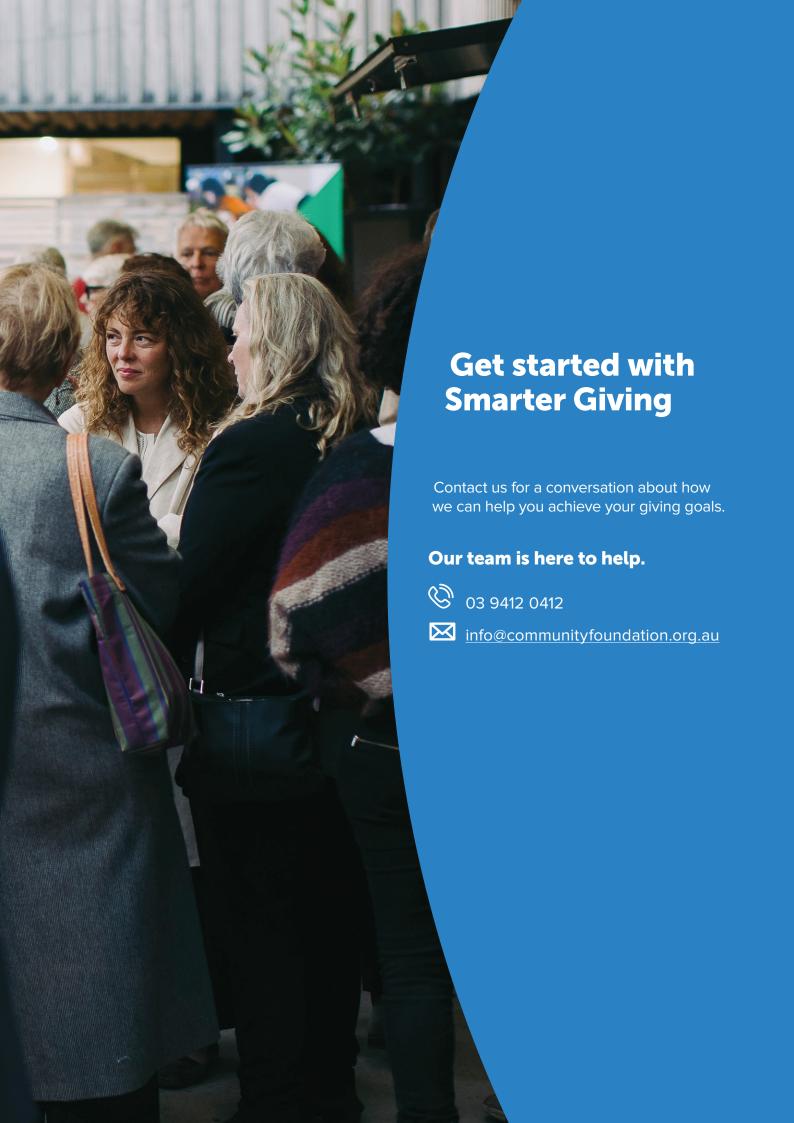
David Ritter



Caroline Vu



Malinda Wink Chair, Philanthropy & Impact Committee



SMARTER GIVING. GREATER IMPACT.

This guide is an introduction to Australian Communities Foundation and the structures, services and community we offer to enable smarter giving.



Australian Communities Foundation is a nonprofit organisation that supports and enables smart, rewarding and effective giving.

Community of Giving

Level 6, 126 Wellington Parade East Melbourne VIC 3002

03 9412 0412 info@communityfoundation.org.au

Bottom left: Original Power Middle right: Amelia Caddy / Bush Heritage Australia