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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.



Smarter Giving. Greater Impact.

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 that we can give the right advice to maximise the impact of your giving.

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 your tax deduction is separated from choosing a cause to support. Receive the deduction now and find the right opportunity to support later.

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



Maree SideyChief 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.

Structure

There are several ways you can structure your giving. We're experts in identifying the best option for a variety of circumstances and can help you choose the right one for you. 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 administration and compliance covered + 100% responsible investing

PRIVATE FOUNDATION

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

Services

Building on our long track record of strategic giving, connections to community and strong infrastructure, we offer a range of additional services.

PHILANTHROPIC SERVICES

Philanthropic strategy, grantmaking, grant rounds and scholarships

ACF ADVISORY

Support for trusts and foundations, including philanthropic, compliance and administration services, plus three tailored packages for Private Foundations

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

STRUCTURE | SERVICES | COMMUNITY | + MORE

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 Foundations OR 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 our ACF Advisory – see pg. 11.

SUPPORT FOR PROFESSIONAL ADVISERS

Are you a professional adviser? 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.



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: 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."

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."



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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.

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.

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: SCHOLARSHIP FUNDS

Michael Fox chose to establish a Scholarship Fund in honour of his late wife Jude, known for her passion for helping students build bright and prosperous futures as Founding Principal of Flagstone Community College in Queensland. The Jude Fox Bursary Fund grants \$3,000 scholarships to Flagstone students facing barriers to attending university.



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	\$20,000	Ideally more than \$2 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 advisers	You nominate an investment adviser 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

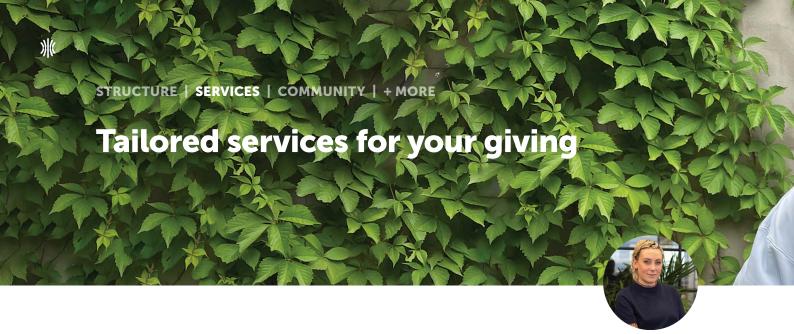
^{*} Unless you establish your Fund within our Extension Fund to give to non-DGR1 organisations.

^{**} 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.

Georgia MathewsDirector of Philanthropy

Bespoke 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, ADVICE + COACHING

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 Philanthropy team: **03 9412 0412** or email **grants@communityfoundation.org.au**





ACF Advisory

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

COMPLIANCE

- Preparation of annual accounts
- ✓ Liaising with auditors
- Liaising with investment advisers
- ✓ Preparation of papers for signing of accounts
- Attendance at signing of accounts meeting
- Preparation of annual report
- ✓ Quarterly GST compliance
- Preparation and management of cash flow
- Lodging Annual Information Statement with ACNC and attending to other ACNC matters
- Provision of other financial advice and assistance as required

ADMINISTRATION

- Preparation of trustees' papers including reports
- Coordination of information from other service providers such as investment advisers
- ✓ Attendance at trustees' meetings
- Preparation and circulation of minutes from trustees' meetings
- Board meeting preparation, documentation, attendance and follow-up
- Meeting coordination, phone calls 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

Our giving community



Carly SeverinoDirector of Community

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 500+ 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

Our giving community came together at the Victorian Pride Centre to celebrate the Impact Fund's fifth anniversary in 2022.

At Australian Communities Foundation, we support our community to give effectively to the causes they care about. Since 1997, we have distributed over 11,000 grants totalling \$150+ million on behalf of our giving community to the following sectors.

EDUCATION, TRAINING + EMPLOYMENT

\$30+ million



INDIVIDUAL/FAMILY SERVICES + SUPPORT

\$22+ million



INDIGENOUS COMMUNITIES

\$21+ million



ENVIRONMENT, CONSERVATION + CLIMATE CHANGE

\$20+ million



HEALTH, WELLBEING + MEDICAL RESEARCH

\$20+ million



ARTS + CULTURE

\$20+ million



CIVIC ENGAGEMENT + SOCIAL INCLUSION

\$10+ million



+ ECONOMIC
DEVELOPMENT

\$7+ million



FOCUS AREAS









STRENGTHENING



BUILDING A CULTURALLY VIBRANT SOCIETY

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

Making change together: Impact Fund



Laura Mannix Philanthropy Lead

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:

The power of giving together



Tackling Inequality



Safeguarding the Environment



Supporting
First Nations SelfDetermination



Strengthening Democracy

\$6+

MILLION RAISED 100+

FUNDERS GIVING TOGETHER 15+

CHANGES IN POLICY AND REGULATION

10+

SOCIAL
INFRASTRUCTURE
GROUPS ESTABLISHED

From helping win the marriage equality campaign, to overturning laws that discriminate against Indigenous peoples; from showing that farmers care about climate, to standing up for our gun safety laws against a powerful gun lobby – Impact Funders are behind some of the most powerful changemakers in the country.

BECOME AN IMPACT FUNDER

Give through the Impact Fund and join a national movement of 100+ funders and changemakers creating a fairer 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**



- 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: Willum Warrain ('home by the sea') is the voice of Aboriginal and Torres Strait Islander people on Victoria's Mornington Peninsula. The Impact Fund supported Willum Warrain in 2023 to host community forums with Rueben Berg (Co-Chair, First People's Assembly of Victoria), Jeanette Kaindel (President, Willum Warrain), and Peter Aldenhoven (CEO, Willum Warrain) (L–R).

100% responsible investing



Daniel BrugalettaChief 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 advisers, Brightlight, 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.

BRIGHTLIGHT

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 Investing Association of Australia two years in a row.





^{*} For those with private foundations, we can connect you to responsible investment advisers.



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."



When you leave a legacy through your own Fund or Foundation, your gift is invested and can grow into an ongoing source of funding for the causes and charities you care about.

- ✓ Easy way to leave a lasting legacy
- ✓ Always your wishes
- ✓ Named Fund gifts are 100% responsibly invested
- ✓ Public or anonymous it's up to you

Looking for a simpler but powerful way to leave a legacy? Give to the Impact Fund and your gift will be invested in supporting the country's leading changemakers working for a fairer and more sustainable Australia.

Become an ACF Friend

When you commit to leaving a bequest to your own Named Fund or the Impact Fund, you'll enjoy all the benefits of our giving community (see pg. 12), plus more as an ACF Friend.

ACF Friends is a special group of supporters of the work we do towards a fairer and more sustainable Australia. As a token of our appreciation for our Friends, we offer unique opportunities for this group to get together and engage with community partners, including exclusive invitations. Friends are also the first to hear about new developments at the Foundation.

AUSTRALIAN COMMUNITIES FOUNDATION

Leadership and Governance

Executive Team



Maree Sidey
Chief Executive
Officer



Carly Severino
Director of
Community



Olivia
Clark-Moffatt
Director of
Engagement
& Advisory



Daniel BrugalettaChief Financial &
Operations Officer



Georgia MathewsDirector of
Philanthropy

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.



Eric Beecher Chair



Penny BurkeChair, Nominations
Committee



Gia Cari



Chris Croker



Sue Dahn Chair, Investment Committee



Adam Milgrom



Glen Noonan Chair, Finance Risk Audit & IT Committee



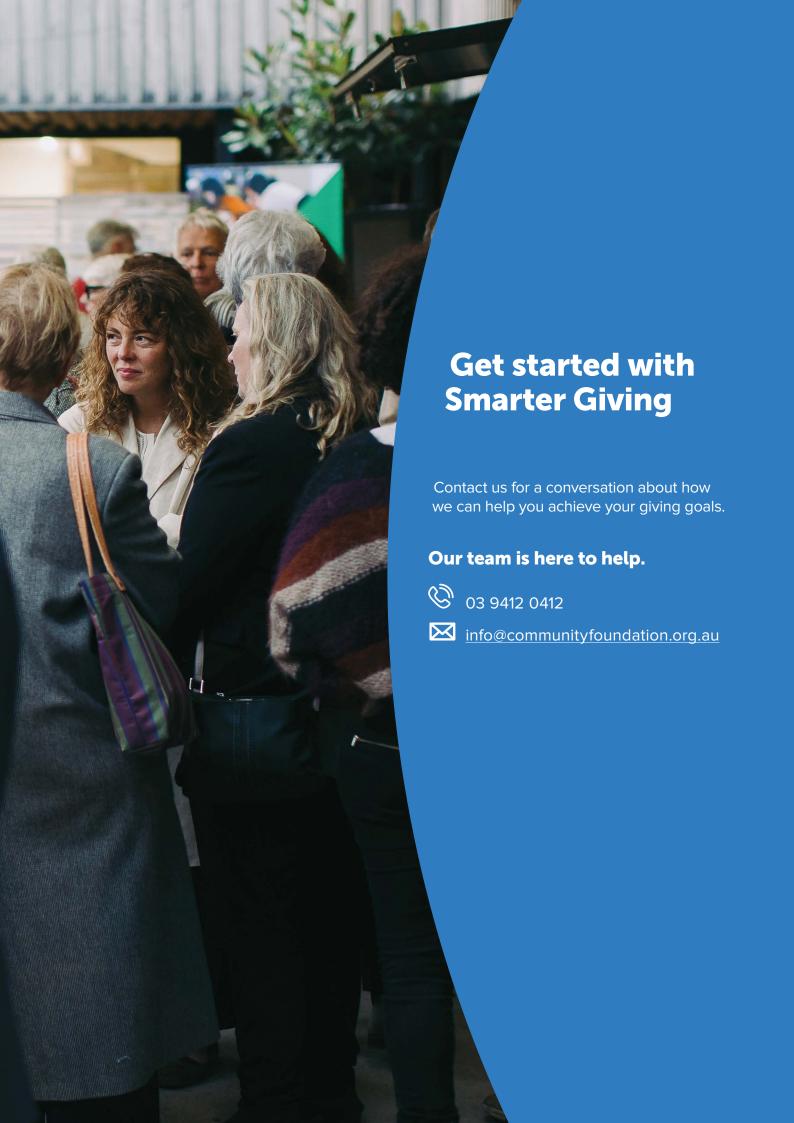
David Ritter



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