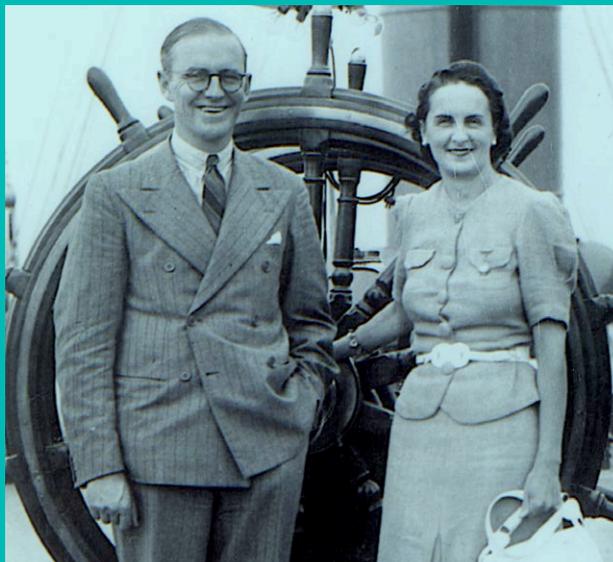


# Annual Report /2019-20



# Contents

What we do	3
From the Chair and CEO	4
Approach to grantmaking	6
Funding priorities take shape	7
Featured grants:	
Educational Equity	8
Biodiversity Conservation	12
Bushfire response	14
COVID-19 response	15
Grants 2019-20	17
Governance	20
Investments and financial report	22
Hillview Quarries	26



Roy Ross and with wife Molly in front of the SS Orion in March 1939.

## Roy Everard Ross

The Ross Trust is grateful for the foresight and philanthropy of our benefactor, the late Roy Everard Ross.

Since its inception, \$123.5 million has been approved in grants from the Trust. Combined with the contribution Hillview Quarries has made directly to the communities of the Mornington Peninsula, in the form of sponsorships, donations and product donations, the total amount approved is \$138.7 million.

Roy Ross hailed from Mansfield in the foothills of the Victorian Alps. Having obtained qualifications as a surveyor and engineer in Melbourne at the Working Men's College – now RMIT University – he worked for 25 years as a shire engineer in West Gippsland.

As in all country towns, your day job is just one small part of your involvement with the local community.

In looking back at Roy Ross's life and history, one point stood out this year. During his time in West Gippsland, he was intimately involved with the response to the 1939 Black Friday fires, having the unenviable task of leading the police rescue team to help remove the remains of people who had perished in the small town of Noojee (Sandilands, J. Roy Everard Ross, p20).

It is with this in our thoughts, that we pay tribute to the resilience of Victorians affected by fires and so much more this year and thank all of those who have worked tirelessly to help with the response and recovery to ongoing challenges.

We are incredibly grateful for the contribution of our grantees who continue to give life to his wishes.

## Production

Design by Jenny Bullock from The Designery.

Writing and editing by Writeside Communication.

Our thanks to all the organisations and individuals who have contributed photos and stories to this report.

The Trust's logo was designed to convey the essence of a charitable trust – growth, warmth, energy and an outward reach.

## The Ross Trust

Ground Level, Suite 2, 43 Agnes Street  
East Melbourne Vic 3002  
Telephone (03) 9690 6255  
[www.rosstrust.org.au](http://www.rosstrust.org.au)  
[information@rosstrust.org.au](mailto:information@rosstrust.org.au)

Our cover shot is of students from the Cribb Point Primary School. The image was taken by Rob McKechnie.

# What we do



## Our vision:

The Ross Trust is a perpetual charitable trust with a vision to create positive social and environmental change so Victorians can thrive.

## Our mission:

We address disadvantage, inequity and facilitate change by:

- delivering educational opportunities for vulnerable young Victorians
- enhancing biodiversity for the sustainability of Victoria's native flora, fauna and ecosystems
- maintaining the flexibility to respond to Victorians in crisis and work collaboratively to build the capacity of the philanthropic and social sector.

## How we work:

The Ross Trust is a compassionate and responsive philanthropic leader. We act with integrity and work transparently to foster ideas and innovation, achieve long-term impact and systemic change.

## Our 50 Year Anniversary:

This year marks 50 years since the death of our benefactor, Roy Everard Ross.

Mr Ross was an astute investor and entrepreneur, who came from the land and was at various times a surveyor, local government engineer, naval officer and quarry owner. Much of his wealth was amassed on the back of investments in mining and the media.

The philanthropic approach he desired – with all net profits from his quarry and investments to go to charitable purposes – was and is unique to this day.

## Our values:

**Ethical**  
**Sustainable**  
**Innovative**  
**Adaptive**  
**Compassionate**

Mr Ross knew the financial and infrastructure benefits of developing a quarry in Victoria – both to himself and others. He reconciled his love of plants and trees and passion for conservation with his quarry business.

In June 1971 the R E Ross Trust was established as a company to act as custodian of his estate and fulfill the wishes of Mr Ross's will.

In the coming year, we will celebrate 50 years of the Trust and highlight the key achievements over the past five decades.

# From the Chair and CEO

## **It is quite a challenge to start any story about 2019-20 without referencing the twin crises of bushfire and the global pandemic of COVID-19.**

For the Ross Trust, we started our story of the last financial year as the first with a new five-year strategy in place and a strong financial position, which placed us very well to respond to this unique year with compassion, clarity and action.

It has been a time which has shown up the stark reality of those who don't have access to basic needs, but also highlighted the incredible role philanthropy can play in responding to crises and calling out these inequities to advocate for change.

The challenges facing society are as acute as ever. Climate change threatens the very existence of future generations and COVID-19 has the potential to negatively impact all nations for a long time.

Philanthropic organisations, including the Ross Trust, have a unique opportunity to play a part in improving Australia's response – in the short and long term.

Given the context, we are incredibly proud that this has been a year where we have been able to bed down our new strategic direction, whilst being nimble enough to respond to crises. In the financial year 2019-20 the Trustees approved 59 new grants. In total, the Ross Trust paid new and existing multi-year approved grants to the value of \$4.4 million.

The highlight was the significant increase in biodiversity conservation grants and spending – the clarity our strategy has given for our grants and support to environmental organisations has enabled significant work to be undertaken by a broad range of communities. Many of these locally-driven organisations have built long-term partnerships and collaborations with us and each other, to drive strong outcomes for Victoria's biodiversity. Over \$1.5 million was approved for biodiversity conservation grants for the year; more than the total awarded for flora and fauna grants for the five years prior. A heartfelt

thanks to all those organisations who reached out to us to discuss their funding needs and highlighted the amazing work they are undertaking on the ground.

We see this as an investment in the future and we are keen to keep working with these grantees who are on the way to contributing to some significant environmental milestones.

While the strategy gives us a clear focus on two key areas of funding – biodiversity conservation and educational equity – we've also continued our well known place-based approach, with a more concentrated commitment to the Mornington Peninsula, in particular breaking the cycle of disadvantage in places like Hastings, Crib Point and Rosebud. Based on persistent school and community need, the Trustees made a 10-year commitment to addressing the barriers to participation in education, and local community disadvantage, through collaborations and direct support. This is reflected in decision-making with funds granted to the Learning Guarantee Project, just to name one. We have a strong relationship with many organisations that are at the coal face of educational inequity on the Mornington Peninsula. We are pleased to be able to make a meaningful contribution to the work they are doing.

Our commitment to advocacy as a key tool of philanthropy has grown this year. We featured as part of Philanthropy Australia's new advocacy toolkit and the Trustees allocated further funds for the Australian Council of Social Services' (ACOSS) Raise the Rate campaign, the Alliance for Gambling Reform, and funded a nature conservation campaign position with the Victorian National Parks Association.

Like so many organisations, we will face significant challenges over the coming years. However, we benefit from a strong financial position, thanks to some excellent advice and planning in the past. We also have a nimble and innovative team which has responded and worked quickly and strategically with grantees to identify and fund areas of great need.

Without skipping a beat, in keeping with government guidelines, we moved the team and the Trustees to a largely remote-working environment from March, whilst continuing to provide a strong level of service and connection with our partners and collaborators. We would like to thank the staff at the Ross Trust for their professionalism and resilience during this period.

These are signs of maturity you would hope to see in an organisation as it approaches its 50th anniversary and we could not be more proud of our people and our grantees who have done their level best to help Victorians thrive under extreme pressure.



**Geoff Nicholson**  
Chair, the Ross Trust



**Sarah Hardy**  
CEO, the Ross Trust

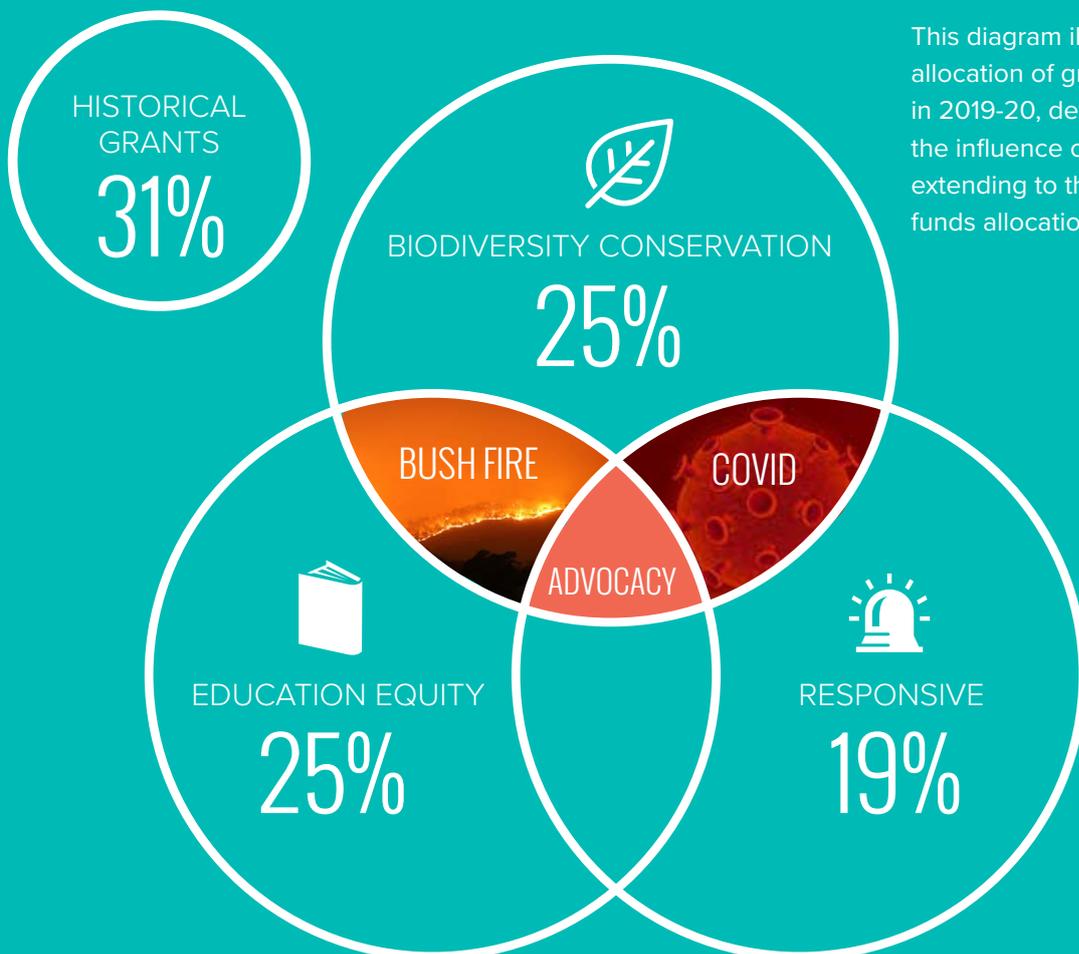
# Approach to grantmaking

2019-20 was the first full year of a five-year strategy focusing on two key funding priorities supporting theories of change. This framework is starting to generate some clear advantages as we work with grantees to create positive social and environmental change. Measuring every grantee's proposed activity against desired changes and outcomes, positions the Ross Trust to be able to work with its partners and collaborators to measure long-term benefit and change.

As part of our commitment to the Victorian community, like many philanthropic foundations, we have maintained flexibility to allocate responsive grants for areas of great need and crisis,

which proved to be of significant value in the last financial year. Marrying the clear strategy with some flexibility allowed a more targeted response when crises arose. Our responsive grants also enable us to work collaboratively to build the capacity of the philanthropic and social sector. Responsive grants in 2019-20 targeted bushfire recovery and response, COVID-19 response, and human rights and advocacy, which has been a strong feature of our work over the life of the Trust.

Between the two funding priorities, responsive grants, and continued payment of grants approved in prior years (historical), the Trust paid \$4.4 million in 2019-20.



This diagram illustrates the allocation of grant funding in 2019-20, demonstrating the influence of strategy extending to the responsive funds allocation.

# Funding priorities take shape

## BIODIVERSITY CONSERVATION

### DESIRED CHANGE

Victoria's biodiversity is conserved, protected and valued by all as part of a healthy and resilient environment.



### GRANT TYPES



### DESIRED OUTCOMES

Improved strategic land and water management practices

Stronger more sustainable sector

Improved public dialogue, policy and regulation

Increased actions to conserve biodiversity

## EDUCATIONAL EQUITY

### DESIRED CHANGE

Young people in Victoria have equitable access to educational opportunities so they complete secondary schooling.



### GRANT TYPES



### DESIRED OUTCOMES

Improved readiness to commence in primary school

Increased student preparedness and engagement at transition points

Greater school effectiveness in capability to establish and maintain engagement

FEATURED GRANTS

# Educational Equity

Tyabb Railway Primary School Year 6 student, Tristan Cameron, gives the Learning Guarantee project the thumbs up. Photo by Ross Wettenhall, Learning Guarantee project coordinator.

# Whoever you are, whatever your background, we want you to succeed

## Learning Guarantee Project

Mornington Peninsula Foundation

**\$200,000**

Making sure every child, every day is given the support they need to succeed is the key driver of the Learning Guarantee Project which has been established to address the state of readiness of students in Western Port as they transition from primary to secondary school.

The Ross Trust and the Mornington Peninsula Foundation (MPF) have collaborated on the program, which is part of the Western Port Education Precinct.

And with the commitment of a strong team and a \$200,000 grant from the Ross Trust, this year's work has already started to bear fruit despite the challenges presented by remote learning during COVID-19.

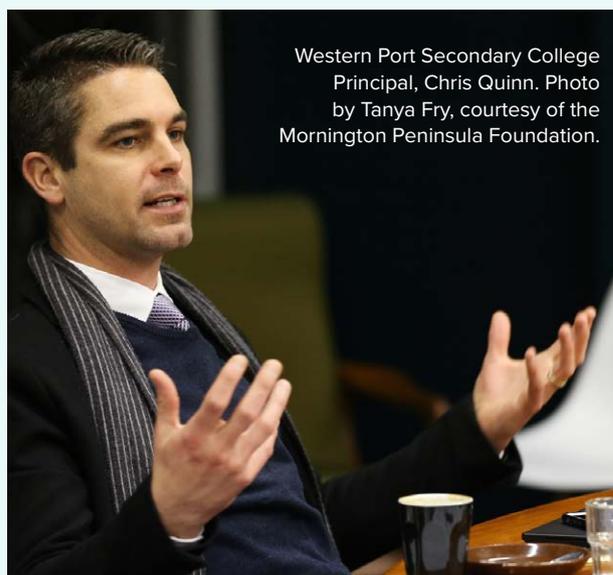
The Learning Guarantee Project was the brain child of the principals of the local area, which has long had pockets of extreme disadvantage, so entrenched that 92 per cent of children start school requiring speech and oral language intervention, and only 30 per cent of students who enrol in Year 7 are at the required academic levels.

The one-year trial to support Year 6 students transitioning from Crib Point Primary and Tyabb Rail Primary to Western Port Secondary College in 2021, aims to test interventions and collect data and intelligence to help shape further work.

This preparation for a successful educational transition is one of the keys to helping break the cycle of disadvantage.

"We need to address the disturbing stats which tell us three out of 10 students are not ready to learn at the high school when they leave primary school," says Stephanie Exton, Executive Director of the Mornington Peninsula Foundation. "How can you transition to high school if you can't read?"

"We needed to get to the root of the issue – where are the kids, what do we know about them and what don't we know? How can we find out?"



Western Port Secondary College  
Principal, Chris Quinn. Photo  
by Tanya Fry, courtesy of the  
Mornington Peninsula Foundation.

"The approach we are taking is whoever you are, whatever your background or the circumstances you find yourself in, we want you to succeed and we're going to wrap the system around you to help you.

"The funding from the Ross Trust has just turbo-charged this program."

And already there are changes.

Stephanie says the hardest thing to measure – but not hard to see – is the culture shift.

"You can see this already. There is a strong sense of optimism in the schools and positive talk in the street."

Most importantly, the Year 6 students have made significant improvement and look to be on track for transition.

"The team just said, 'we're not going to let Covid get in the way'. There has been much more interaction with the parents, the schools understand the kids better, and they are being connected with the services they need via a regular contact with the Western Port Community Centre."

Stephanie said the flexible funding had allowed the team to change things as needed, to keep the project running well.

"We've just had a mindset (with the pandemic lockdowns), which is about thinking smarter and doing things differently. There are so many things you can do – I've been able to call a meeting and get people online later that day to create new collaborations where we pool resources and create more sustainable connections.

"We hope to go full tilt next year and consolidate the work."

Stephanie also welcomed the Trust's ongoing commitment to the area. "The Ross Trust could change the game in 10 years. We've got committed people on the ground who want to do the work."

Principal of Western Port Secondary College, Chris Quinn (pictured) is one of those committed people.

Chris has been involved in developing the Western Port Education Precinct right from its inspiration in an overseas study tour to Canada and the US, with former Principal Michael Devine and Tyabb Rail Principal, Emma Slater. They saw up close the community-led approach at the Harlem Children's Zone and how this had worked to cut through the cycles of disadvantage. "We used the model on a smaller scale with our community".

This year, the grant from the MPF and the Ross Trust has seen full-time Learning Guarantee coordinator, Ross Wettenhall – backed up by two part-time education support staff – able to spend time connecting with the teachers, students and parents of the two primary schools. With two days a week in each of the primary schools (remotely for much of the year), Ross – a former teacher at Tyabb Rail primary school – has built on his existing relationships and gained an understanding of the learning needs of the Year 6s to bring the intelligence back to the Year 7 teachers, who will be teaching them next year.

Chris says already there have been breakthroughs with the love of learning coming back for some students, with good feedback from the families and with Ross able to provide a strong mentoring role.

"By working alongside the classroom teachers, Ross is able to connect with students one on one and ask them how they are feeling, identify additional supports they may need for their learning, and any additional factors that are impacting their availability to learn."

Chris echoes Stephanie's view that the pandemic lockdowns have had some benefits. The digital literacy of both students and teachers has increased and there has been the ability to link in with students who require a more flexible and individualised learning program.

"This could be one element of the program that continues even after students are back in the classroom."

As a result of Ross's work, there has been a consistent finding that literacy is a significant gap.

In response (and as part of the Learning Guarantee Project), Ross completed professional development training called 'Sounds Write', an intensive program in explicit synthetic phonics. Chris says its been a game changer in helping the students become more prepared for secondary school. Additional funding from the Mellett Family, an early adopter of the Learning Guarantee Project, will enable 16 teachers from across the Western Port area to complete this training and prepare a roll out of the program in 2021.

"The Learning Guarantee Project gives us a more intensive focus on what we need to do next year as we help the current group of 34 Year 6 students across two schools, transition into Western Port Secondary College," Chris says.

"Part of this transition is knowing that relationships with students and families are already well established and baseline data has been collected, so it is clear what academic interventions are required and what psychosocial supports are needed."

The benefits are not only about the individual students, but also about the reputations of the schools and the local community. Chris says; "Western Port Secondary College has a strong focus on both the academic achievement of the students as well as supporting their wellbeing to improve student learning outcomes."

As a result of this, Western Port Secondary College has already seen strong enrolment numbers for next year – 139 students coming into Year 7, up from just under half that five years ago.

One of the benefits of the whole Western Port Education Precinct is the strong connection and commitment across the leadership of all schools in the area – a strong commitment to the 'moral intent' of the program, which is to make sure no student is left behind.

"It would be amazing if we have the Learning Guarantee in place across our community and viewed as something of a rite of passage for all our young people. From the start of primary school through to gaining their senior certificate, there was no stone left unturned to identify and provide the required educative and non-educative supports that best prepares students for a strong and targeted pathway of their choosing."

### Mornington Peninsula place-based commitment

This grant is part of a 10-year commitment the Ross Trust has made to a place-based approach in the Mornington Peninsula, with a focus on Hastings, Rosebud and surrounds (Western Port). This is an area with complex social issues and intergenerational disadvantage. All the schools in this area are below 1000 on the Index of Community and Social Education Advantage. Through collaborations and direct support, the Ross Trust commitment will focus on projects addressing barriers to participation in education and local community disadvantage.



Heading to school with the walking school bus. Photo courtesy of Launch Housing.

## Education steps up when home is not an option

### Education Pathways Program

Launch Housing

**\$250,000 over three years**

“I’m proud. I’m a learner now. I can write words I couldn’t, and I try hard now. I am a great runner and I’m good at climbing trees. And I’m kind. Yeah, I think I am kind.” Finn, 8 years old.

It would be hard to find a better way to spell out the value of a program for school children experiencing homelessness.

The Ross Trust granted \$250,000 over three years to Launch Housing’s award-winning Education Pathways Program (EPP) to support school children who don’t have a home, stay connected with education and services.

Launch Housing’s mission is to end homelessness. It is Victoria’s strongest advocate for affordable housing, and a leader of research into homelessness. The EPP is all about helping families and students experiencing homelessness and family violence, remain in education.

Homelessness or an unstable home life is a significant risk factor in disengagement from education and in turn leads to poor socio-economic and other outcomes throughout life.

The EPP is one of the first programs to address the impact of homelessness on children’s education, giving it a strong alignment with the Ross Trust’s educational equity funding priority.

The program is already producing excellent results in southern metropolitan Melbourne, with an increase in enrolments and attendance for homeless primary

school students. According to an evaluation report, the program results in “tangible and effective outcomes for primary school-aged children up to 12 years of age experiencing homelessness”.

One of the most effective parts of the program is taking the responsibility for enrolling the students and helping them get to school each day, reducing stress for parents, particularly if they are already away from home due to family violence or financial hardship.

The EPP is delivered by a multidisciplinary team that includes social workers, a psychologist, volunteers, and a speech pathologist, who work in partnership with schools and teachers. The team undertakes assertive outreach (meeting people in their own environment), short-term school enrolment, lead a walking school bus, and provide breakfasts and lunches. Targeted educational assessments, speech pathology, and transition support to new schools, are also part of the program once more stable accommodation is secured.

EPP Coordinator, Shannon Richardson, said the most rewarding part of the EPP was to be able to design a program that specifically addresses a significant sector service gap.

“The program is flexible, responsive and tailors an individualised support plan for each child. The program stays with the child for as long as they need to and will travel with the child throughout their homelessness journey. This is something that is rarely heard of within the social services sector.

“We are incredibly proud to deliver this award-winning program that supports one of society’s most vulnerable and largest growing cohort – homeless children.”



# Biodiversity Conservation



## Funding reef restoration off the coast of Dromana

### Bringing back Victoria's lost reefs

The Nature Conservancy Australia  
**\$287,000 over two years**

A significant biodiversity conservation grant awarded to The Nature Conservancy Australia is helping fund a reef restoration project in Port Phillip Bay off the coast of Dromana – part of Australia's largest marine restoration initiative.

The Ross Trust awarded a grant of \$287,000 over two years to support the plan to bring back Victoria's lost reefs.

A successful model is being rolled out to bring back 60 shellfish reefs around Australia.

The Ross Trust, the Ian Potter Foundation and the Thomas Foundation are co-funders of 'Bringing Back Victoria's Lost Oyster Reefs', to restore a further one hectare of new oyster reef near Dromana. This project is also set to improve community understanding and knowledge by engaging 50 local volunteers in citizen science and active restoration activities.

Extensive fishing in the late 1800s and early 1900s, broke up the reefs and along with commercial dredging, pollution and overfishing, contributed to the decimation of the ecosystems.

The project aims to restore native oyster reef ecosystems to improve Port Phillip's biodiversity, fisheries and water quality and to recover a near lost ecosystem from extinction.

One of the appealing features of The Nature Conservancy's model for reef restoration is the involvement of the local community. They seek to build capacity and also create jobs and other local opportunities.

With a collaborative approach, The Nature Conservancy is involving recreational fishers and government in site selection; maritime construction firms, commercial divers, mussel farmers and shellfish hatchery in design and construction; community groups, divers, citizen scientists, corporate partners in shell preparation and reef monitoring; restaurants, seafood wholesaler, corporate partners in shell recycling.

The project will benefit all Victorians including visitors now and in the future, by enhancing marine biodiversity, fish numbers and cleaner waters, whilst also contributing to the recovery of Victoria and Australia's most imperilled marine ecosystem.

The Nature Conservancy is a leading conservation organisation working around the world to protect lands and waters and has operated in Australia since 2002.



## Setting the road to recovery

### Bushfire response

Multiple grant recipients

**\$248,450**

The bushfires that raged across Victoria and other parts of the country in late 2019 and early 2020 had a devastating impact on the state's biodiversity and the communities in the fires' path.

The Victorian government estimates 1.5 million hectares burned, impacting threatened species and their habitats, with 244 species of plants and animals losing more than 50 per cent of their likely habitat.

Knowing recovery from natural disasters is about short-term response and longer-term recovery, close to \$250,000 was committed to post-bushfire response projects to help disaster-affected communities start the long road to recovery.

With a philosophy of ensuring funds were dispersed quickly and without additional red tape, the Trust engaged with existing grantees and collaborators to identify fund recipients.

The Trust made an initial grant of **\$50,000 to the Foundation for Rural and Regional Renewal (FRRR) Disaster Resilience and Recovery Fund** in January 2020 as an immediate response and then took time to consider how best support recovery activities.

The returns from this FRRR perpetual fund provide grants to communities to support disaster preparedness and recovery and ensure that donated funds reach grassroots organisations which often miss out on disaster donations.

On top of this initial response, the Trust funded several projects to help with environmental and school recovery in East Gippsland.

**Clifton Creek Primary School**, which provides a special learning environment for a farming community, was destroyed in the January bushfires. **Toorloo Arm Primary School**, at Lake Tyers, was damaged and many families were affected by the fires. Both schools had already been identified as having significant socio-educational disadvantage. Grants of **\$10,000 went to each school** for the purchase of additional devices to allow students to

undertake classes on their computers whether at school or at home.

Providing funds for the purchase of laptops, iPads and appropriate software addressed immediate online learning needs and ensured better crisis management for the schools, in the event of future natural disasters.

With a focus on environmental recovery, the Trustees awarded four additional grants to the East Gippsland Landcare Network and the East Gippsland Conservation Management Network.

**\$34,000** went to the **East Gippsland Conservation Management Network** for rainforest regeneration work. The Network was also awarded **\$29,500** for recovery of threatened and endangered owls. These funds will go towards helping ensure habitat is retained to enable three large forest owl species – the sooty, powerful and masked owls – to survive and have a future.

**The East Gippsland Landcare Network received \$75,000** for the revegetation and protection of native indigenous species and **\$14,950** for post-fire monitoring of vegetation regrowth, wildlife and pest animals.

The Trust made a **\$25,000** grant to **BirdLife Australia** to contribute to supporting the long-term recovery of wildlife after the fires.

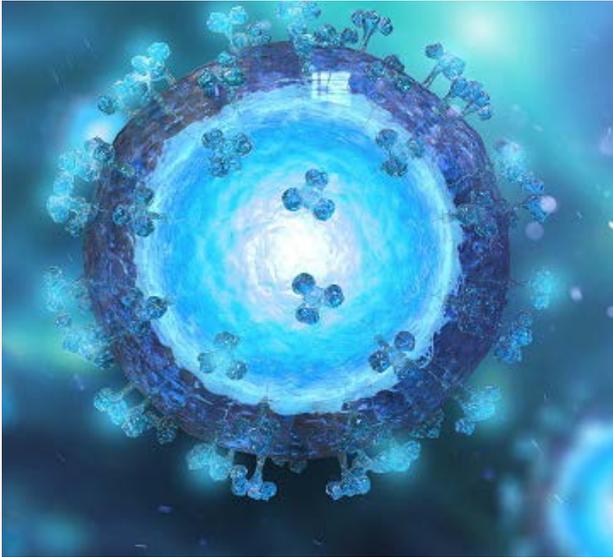
### For the longer-term

To support the likely increased demand for free legal support and advice for individuals and community organisations, the Ross Trust provided a **\$72,000** grant to **Justice Connect**, to allow for a response to both bushfires (\$50,000) and COVID-19 (\$22,000).

The fires provided a stark illustration that the urgency to get biodiversity conservation right becomes clearer every day.

From that perspective, the Trustees also boosted grant funds to support biodiversity conservation, essentially bringing forward an intended approach under the five-year strategy – making it happen a bit earlier. **\$350,000 was redirected to biodiversity conservation for the financial year.**

Photo of a forest burnt and recovering in East Gippsland (Shutterstock).



## Rapid response to help the most marginalised

### COVID-19 response

Multiple grant recipients

**\$232,200**

Grants to support some of the most marginalised people in the Victorian community were awarded as part of a rapid response to the COVID-19 pandemic in the first half of 2020, with a targeted focus on the Mornington Peninsula.

The organisations allocated grant funds, had long-term relationships with the Ross Trust, enabling the fast-tracking and assessment of grant submissions.

The initial COVID-19 response focused on the Mornington Peninsula, in line with the Trustees' place-based strategy, approved late in 2019. This included grants to three of the **Mornington Peninsula's emergency relief and material aid centres of \$25,000** each to:

- **Southern Peninsula Community Support and Information Centre**
- **Mornington Community Information and Support Centre**
- **Western Port Community Centre.**

A small grant to assist school children with limited access to online facilities learn at home, also formed part of our response to the pandemic.

At **Wallaroo Primary School on the Mornington Peninsula**, many of the students and families struggle with access to the internet or IT devices, making it incredibly challenging to complete their schoolwork at home, as required during the coronavirus lockdowns in Victoria.

Having already established a relationship with the school, the Trust made contact to better understand the need. As a result we delivered an immediate grant of **\$15,000** to assist with the transition to online learning from home.

Initial assessments showed 58 students had no access to a device to support their learning and eight families had no internet access at all. The Trust's funding went towards the purchase of devices to access online learning, learning apps, dongles to provide internet access / prepaid internet, USB Wi-Fi adapters and cabling to support students' access, and cases or covers for their new devices.

Overall, the Trustees approved eight unrestricted grants, including to the **Asylum Seeker Resource Centre (\$20,000)** and **Council of Single Mothers and their Children (\$25,000)** and also provided a grant to **Justice Connect** for digital infrastructure to support the services they offer to clients during COVID-19.

Asylum seekers faced additional challenges of no access to medical and social security systems and no access to the government's COVID-19 response payments such as JobKeeper. The Ross Trust grant went towards humanitarian needs such as food packs, healthcare, and rental assistance.

The Council of Single Mothers and their Children (CSMC) supports over 3500 members. During the pandemic, single mothers, like others in the community, have been navigating everything from financial stress to supporting school-aged children learning from home.

**Launch Housing was also awarded \$25,200** for access to IT materials and support for children in the Education Pathways Program. This was in addition to a recent Educational Equity Challenge and Change grant of \$250,000 awarded to the program.

As COVID-19 started to impact rental agreements, employment, and financial stability, Justice Connect experienced a significant increase in calls for assistance.

In response, the free legal service moved many of its services onto online platforms and tailored them appropriately, so that they could be accessed more easily while the social distancing and lock down measures continued.



## Champions for Change program

Alliance for Gambling Reform

**\$110,000 over three years (Responsive grant)**

Who better to advocate for changes to the system than those most hurt by it?

The Alliance for Gambling Reform will work with an additional 50 people who have experienced the serious harm cause by gambling, and harness their storytelling skills as part of a strategy to reform the industry and prevent others experiencing similar trauma.

The Alliance's Champions for Change program, which gives those with lived experience of gambling harm the confidence and platform to tell their stories, received a boost with a \$110,000 responsive grant from the Ross Trust to expand the program in Victoria.

With a focus on prevention and harm reduction, the Alliance adopts a public health model to strongly drive an agenda to reduce impact on individuals and families as Australians lose \$24 billion to gambling every year. This is more per capita than any other developed country, with just over half going on poker machines.

The Alliance's agenda is also driven by data which tells them that over 500,000 Victorians have been directly harmed by gambling with another million on top of that harmed by someone else's gambling. The Alliance works with local partners who understand their communities and see gambling harm exacerbating issues such as family violence, financial stress, mental health issues and homelessness.

Alliance for Gambling Reform Executive Director, Tony Mohr, says the only thing standing in the way of change is political will.

Whilst the key decision-makers will look at all kinds of intelligence to feed into policy decision-making, often a story of personal experience will have an impact on how they approach the issue.

## Champions pitch to reduce gambling harm

"We know many of the politicians who speak out for gambling reforms started on the journey with a personal connection to gambling and its impacts. We understand how powerful these stories can be," Tony says.

"We want to bring politicians together with people who have lived through gambling harm and use the power of those face-to-face conversations.

"Part of the challenge is to work through with people the stigma and shame they may have about their gambling and how it has affected themselves and others. They might have concerns about how speaking publicly might affect things like job prospects.

"Mostly they have a deep desire to ensure no-one goes through what they've been through.

"We work to give them the confidence and skill to engage in advocacy," Tony says.

While there are gambling support programs in place, the focus of the Alliance is the upstream activities – changing policy and limiting access and supply.

In Victoria one of the key issues is the operating hours and the availability of poker machines in clubs and pubs.

The closure of pubs and clubs under pandemic lockdowns has given the Alliance some clear and compelling data to better illustrate their case.

Tony says estimates indicate \$1.5 billion has been saved and more than \$2.5 billion not spent by Australians during the lockdown, thanks to the closure of pubs and clubs stopping patrons from using poker machines.

This is a staggering sum and highlights what could happen if policies were to support poker machine restrictions. The Alliance is working for is a restriction to opening hours, whereby access to poker machines would be severely restricted – if not stopped – during the statistically most harmful hours of 12-3am.

They are also seeking an end to loyalty programs, which see venues roll out the red carpet to heavy gamblers. They also want to change public attitudes to the way we understand gambling.

# Grants 2019-20

## **Albury Conservation Co Ltd**

Safeguarding endangered species in Wodonga's rapidly expanding urban growth areas

**\$40,000.00**

---

## **Alliance for Gambling Reform Inc**

Champions for Change: Empowering people harmed by gambling

**\$35,000.00**

---

## **Asylum Seeker Resource Centre**

Emergency Relief COVID-19

**\$20,000.00**

---

## **Asylum Seeker Resource Centre**

Building capacity, sustainability and accountability through Monitoring and Evaluation

**\$50,000.00**

---

## **Australian Council of Social Service**

Raise the Rate campaign (Phase 4)

**\$50,000.00**

---

## **Australian Environmental Grantmakers Network (AEGN)**

AEGN Core Funding - Ambassador Support

**\$49,500.00**

---

## **Australian Network for Plant Conservation Inc**

Plants Going Places - capacity building in the translocation of threatened native plants in Victoria

**\$35,842.00**

---

## **Australian Schools Plus Fair Education**

Victorian trial

**\$101,400.00**

---

## **Ballarat Neighbourhood Centre**

Our Kitchen - Pathways to employment through hospitality

**\$20,781.00**

---

## **Banyule Community Health**

We Love Stories

**\$40,000.00**

---

## **Baptcare**

Expanding Hope - supporting families seeking asylum

**\$30,000.00**

---

## **batyr**

batyr@school Victorian Regional Expansion

**\$39,000.00**

---

## **Biolinks Alliance**

Heathcote Local to Landscape: Building a long-term collaborative landscape project in the Heathcote Region

**\$100,000.00**

---

## **BirdLife Australia Pty Ltd**

Birds on Farms

**\$30,000.00**

---

## **BirdLife Australia Pty Ltd**

Support the long-term recovery of wildlife after bushfires

**\$25,000.00**

---

## **Bush Heritage Australia**

Nardoo Hills Reserve Rehydration Pilot Project

**\$40,000.00**

---

## **Campaspe Cohuna LLEN**

Campaspe Youth Partnerships

**\$30,000.00**

---

## **Caroline Chisholm Education Foundation**

Student Scholarship Program

**\$7,000.00**

---

## **Centre for International Child Health**

Child Health in Papua New Guinea and the Solomon Islands

**\$125,080.00**

---

## **Clifton Creek Primary School**

Bushfire crisis response grant

**\$10,000.00**

---

## **Colman Education Foundation**

Establishing Our Place in Frankston North

**\$100,000.00**

---

## **Council of Single Mothers and their Children**

Emergency Relief COVID-19

**\$25,000.00**

---

## **Culture is Life Limited**

The Boonwurrung Cross Sector Schools Project - bringing Boonwurrung culture to life in bayside schools

**\$30,000.00**

---

## **Community Information Victoria Inc (CIVic)**

Branching Out; a new way of building capacity of local support services

**\$30,000.00**

---

## **East Gippsland Conservation Management Network**

Owl recovery in post-fire East Gippsland and rainforest restoration project

**\$29,500.00**

---

## **East Gippsland Conservation Management Network**

Owl recovery in postfire East Gippsland and rainforest restoration project

**\$34,000.00**

---

## **East Gippsland Landcare Network**

Flora and fauna fire recovery in East Gippsland

**\$89,950.00**

---

## **East Gippsland Landcare Network**

Lungs of the Lakes

**\$88,100.00**

---

## **Environmental Justice Australia**

River laws program

**\$50,000.00**

---

## **Eureka Mums**

Safe Start Program

**\$30,000.00**

---

## **Euroa Arboretum**

Mentoring young naturalists to develop practical conservation skills

**\$28,200.00**

---

## **Farnham Street Neighbourhood Learning Centre**

Confident CALD Communities

**\$30,000.00**

---

## **Foundation for Rural & Regional Renewal**

Disaster Resilience and Recovery Fund

**\$50,000.00**

---

## **Foundation for Rural & Regional Renewal**

Supporting educational equity initiatives across rural and regional Victoria

**\$50,000.00**

---

## **Foundation for Rural & Regional Renewal**

Supporting biodiversity conservation initiatives across rural and regional Victoria

**\$40,000.00**

---

## **Friends of the Helmeted Honeyeater Inc**

Securing a Future for Helmeted Honeyeaters

**\$49,000.00**

---

## **Geelong Performing Arts Centre**

Parrwang: Aboriginal Youth Arts Project

**\$30,000.00**

---

# Grants 2019-20

## **Gippsland East Local Learning Employment Network**

Growing the HUB  
**\$20,000.00**

---

## **Guide Dogs Victoria**

Specialist early intervention for babies and children living with low vision or blindness in Victoria  
**\$40,000.00**

---

## **Greater Shepparton Foundation Limited**

Early Start Kinder - Culturally and linguistically diverse community  
**\$80,000.00**

---

## **Harrow Bush Nursing Centre**

Bay Riders Community Centre school holiday program  
**\$10,480.00**

---

## **HoMie Street Store (by Conscious Creative Limited)**

HoMie - The Street Store That Gives  
**\$15,500.00**

---

## **Justice Connect**

Support to increase capacity to respond to legal demand coming out of the bushfires and COVID-19  
**\$72,000.00**

---

## **Kids Under Cover**

Partner in preventing youth homelessness  
**\$80,000.00**

---

## **Kilfinan Australia**

Kilfinan Australia - Maximising Impact and Coverage Project  
**\$50,000.00**

---

## **Knox Environment Society**

KES Seed Bank and Genetic Store  
**\$40,000.00**

---

## **Lakes Entrance Primary School**

5 Cs program: Connecting Children with Country, Community and Culture  
**\$21,263.00**

---

## **Launch Housing**

Education Pathways Program  
**\$150,000.00**

---

## **Launch Housing**

Emergency Relief COVID-19  
**\$25,200.00**

---

## **MacKillop Family Services**

Overcoming educational disadvantage through therapeutic life story work  
**\$40,000.00**

---

## **Monash University**

The Indigenous Club of Learning at Port Phillip Prison  
**\$29,956.00**

---

## **Mornington Peninsula Foundation**

Primary to secondary transition  
**\$200,000.00**

---

## **Mornington Peninsula Foundation**

NO LIMITS to learning for children on the Mornington Peninsula  
**\$40,000.00**

---

## **Mornington Community Information and Support Centre Inc.**

Emergency Relief COVID-19  
**\$25,000.00**

---

## **Mornington Peninsula Landcare Network**

Dunns Creek Biolink  
**\$30,000.00**

---

## **Murdoch Children's Research Institute**

Prevention, early intervention and support for school-aged children with mental health issues in regional and rural areas  
**\$99,612.00**

---

## **Nature Glenelg Trust**

Empowering schools and community and improving awareness and understanding of biodiversity and wetland habitat in the western district  
**\$80,000.00**

---

## **Parklands Albury Wodonga Limited**

Protecting Wodonga Regional Park's natural and cultural heritage  
**\$40,000.00**

---

## **PartnerSPEAK**

Peer support hub and PartnerSPEAK office  
**\$23,000.00**

---

## **Philanthropy Australia**

Philanthropy Champions  
**\$25,000.00**

---

## **Philanthropy Australia**

Contribution to Philanthropy Australia Uluru Statement from the Heart  
**\$5,000.00**

---

## **Pigeons Projects Ltd (trading as 100 Story Building)**

Story Hubs pilot program evaluation (measuring years 2 and 3 of a three-year pilot)  
**\$75,600.00**

---

## **Phunktional Limited**

The Robinvale Youth Holiday Program  
**\$40,000.00**

---

## **Project Platypus Association**

Stopping the Kunzea takeover - Protecting the Grampians  
**\$62,756.00**

---

## **Public Interest Advocacy Centre**

Asylum Seekers Health Rights Project  
**\$50,000.00**

---

## **Public Records Office Victoria**

Documenting the history of Victoria: social, agricultural, environmental and scientific images  
**\$50,000.00**

---

## **Refugee Legal**

Refugee Legal core strengthening project  
**\$100,000.00**

---

## **Remember The Wild Community**

Conservationists Initiative  
**\$40,000.00**

---

## **SANE Australia**

Sane Australia 'Help Centre 2020'  
**\$30,000.00**

---

## **Sharing Stories Foundation**

Celebrating Koorie Culture across Victoria through vibrant multi-touch books and displays  
**\$30,000.00**

---

## **SNAICC - National Voice for our Children**

Aboriginal and Torres Strait Islander early childhood education – a collaborative advocacy approach  
**\$50,000.00**

---

## **Southern Peninsula Community Support and Information Centre Inc**

Emergency Relief COVID-19  
**\$25,000.00**

---

## **Southern Peninsula Community Support and Information Centre Inc**

Towards Emergency Relief and Material Aid  
**\$25,000.00**

---

# Grants 2019-20

## Stars Foundation

Expansion of the Stars Foundation school-based mentoring and engagement program for First Nations young women in Victoria

**\$50,000.00**

## TaskForce Community Agency Inc

FADS: Family Alcohol and Drug Support

**\$9,992.00**

## Teach for Australia

Confronting educational inequity across Victoria

**\$100,000.00**

## The Conversation Media Group Limited

Building public awareness of Victoria's biodiversity through explanatory and solutions journalism

**\$40,000.00**

## The Pyjama Foundation

Victorian Love of Learning Program

**\$40,000.00**

## The Song Room

Enhancing education and wellbeing outcomes for migrant and refugee children through arts-based learning

**\$29,900.00**

## The Trustee For The Nature Conservancy Australia Trust

Bringing back Victoria's lost reefs

**\$143,612.00**

## The Wilderness Society Ltd, on behalf of the Places You Love Alliance (PYL)

National Environment Law Reform: building a bigger network of support

**\$60,000.00**

## Threatened Species Conservancy Inc

Saving the Pink-tailed worm-lizard (*Aprasia parapulchella*) from extinction in Victoria

**\$60,000.00**

## Thrive Refugee Enterprise

Victorian small business development manager

**\$90,000.00**

## Toorloo Arm Primary School

Bushfire crisis response grant

**\$10,000.00**

## Trust for Nature

Conservation finance and partnerships

**\$50,000.00**

## Victorian National Parks Association

Protecting Victoria's threatened habitats and species

**\$71,000.00**

## Wallaroo Primary School

Emergency Relief COVID-19

**\$15,000.00**

## Weenthunga Health Network

Bendigo Girls Resilience Program

**\$40,000.00**

## Wellsprings for Women

Building Wellsprings for women's capacity to manage family violence disclosures

**\$30,000.00**

## Western Port Community Support

Emergency Relief COVID-19

**\$25,000.00**

## Westside Circus

Pages Fly

**\$30,000.00**

## Willum Warrain Aboriginal Association

Pun Pun Restoration and Walkway

**\$36,151.00**

## Woor-Dungin

Aboriginal Partnership Program

**\$30,000.00**

## Youth Live4Life Inc.

Live4Life Benalla and Glenelg

**\$30,000.00**

## Youthlaw

Creating Safer Futures

**\$40,000.00**

## Youthrive Victoria (Macpherson Smith Rural Foundation Limited)

Building leadership capacity and mental health awareness in young rural Victorians

**\$40,000.00**



Left: A childcare worker and her charge share a laugh at Lulla's Children and Family Centre, Shepparton. Photo courtesy of SNAICC – National Voice for our Children.

Above: Yellow rumped Thornbill gathering nesting materials in an old Melaleuca tree. Photo by the owner of farming property at Balliang, Pam Goble.

# Governance

The will of Roy Everard Ross named the five original Trustees of the Trust. The will also provided for existing trustees to choose new trustees upon retirement or death.

The Trustees are drawn from diverse backgrounds and experience including business, community service, company directorship, academia, environment, education, law, government and as board members of various other entities; both for profit and not-for-profit companies and organisations.

The Trust has established a protocol for the Chair's role to rotate annually among each of the Trustees.

The Trustees are supported by Trust staff and external advisers who provide professional accounting, investment and legal services. The Trust's accounts are audited externally each year. A copy of the audited accounts is provided to the Attorney-General of Victoria, together with a report by the Trustees on their work during the year.

Each of the five Trustees holds two half shares in a nominee company, R E Ross Nominees Pty Ltd. All five Trustees are Directors of that company which is the nominal owner of the assets of The R E Ross Trust.

The Trust's Chief Executive Officer is selected by the Trustees.

## Responsibilities of the Trustees

### Statutory responsibilities

The main responsibilities of the Trustees are set out in the provisions of the will and the *Trustee Act 1958 (Vic)*. Responsibilities include:

- Administration of the Trust, including the employment of staff and other services that Trustees deem "necessary or desirable in carrying out the trusts of [the] will", the expenses of which may be met from the income of the Trust,
- Investment of the funds of the Trust, including holding these investments in the name of a custodian trustee for which purpose the Trustees may form a company, R E Ross Nominees Pty Ltd, the expenses of which may be met from the income of the Trust, and
- Payment and application of the income of the Trust to charities or for charitable purposes.

In their capacities as Trustees of The R E Ross Trust and as directors of R E Ross Nominees Pty Ltd and Hillview Quarries Pty Ltd, the Trustees also have responsibilities under a number of Victorian and Commonwealth laws, including corporations, industrial, environmental and taxation laws.

## Income and its distribution as grants

Mr Ross provided for the Trust to distribute its income to charities and for charitable purposes. While he expressed a number of wishes as to these purposes, he gave his Trustees absolute discretion when making these decisions.

The Trustees have granting strategies and support projects which have regard to Mr Ross' wishes.

Strategies and projects are varied from time to time to respond to changing community needs and circumstances, and to enable the Trust's income to contribute effectively to public benefit mainly in Victoria.

## Gifts and bequests

The Trust has the capacity to manage new funds contributed by gifts or bequests. Prospective donors or their advisers can contact the Trust's CEO for further information.

## Taxation status

The Trust is a Tax Concession Charity (TCC).

## Trustee decisions and meetings

### Decisions

The Will provides for decisions to be made by a majority of Trustees. Except in circumstances approved by Trustees, all significant decisions are made at meetings of Trustees. The Trust maintains a Financial Authorities Register which sets out who may exercise authority under certain circumstances which have financial implications.

### Meetings

During the year there were 11 meetings of the Trust and four meetings of the Investment Committee.

Ten meetings of the Directors of Hillview Quarries Pty Ltd were held as well as one meeting for the Directors of R E Ross Nominees Pty Ltd.

# Governance

## Remuneration

### Payment of Trustees

By special orders of the Supreme Court of Victoria, the Trustees are paid commission if the Attorney-General of Victoria is satisfied with information provided by the Trust. The Trust submits a copy of the annual accounts to the Attorney-General each year, in the form of the annual report, together with a report of the activities of the Trust.

All Trustees are also Directors of Hillview Quarries Pty Ltd.

## Trustee disclosures

### Prue Digby, Trustee

Former Chief Executive Officer and senior executive in the State and Local Government sectors

Council Member, Birrarung Council

Board Member, Chisholm Institute (TAFE)

Board Member, Municipal Association of Victoria (MAV) WorkCare

Municipal Monitor, Frankston City Council (completed 2019)

### Jeremy Kirkwood, Trustee

Chairman, Talisman Mining Limited

Director, Joyce Corporation (from January 2020)

Director, Independent Schools Victoria

Director, Nurturecare Pty Ltd

Chairman, Kin Mining NL (until July 2019)

Chair, Geelong Grammar School (until 31 December 2019)

### Geoff Nicholson, Trustee

Former public company finance and strategy executive

Director, United Energy Distribution Holdings Ltd

Advisor, Endeavour Energy

Director, Telecommunications Industry

Ombudsman Ltd

Advisor, Bourne Digital

Director, Athletics Australia Ltd

### Jenny Stephens, Trustee

Former social researcher, academic and higher education executive

Council Member, Philanthropy Australia

Director, Tanjable Pty Ltd

### Jon Webster AM, Trustee

Former partner of corporate law firm, Allens Consultant, Allens Linklaters

Director, AMCIL Limited

Former Director, Human Rights Law Centre

Member, Advisory Board of the Centre for Corporate Law and Securities Regulation

Former Chair, Northern Land Council audit committee

## Staff

Ms Sarah Hardy, Chief Executive Officer

Ms Rebecca Chew, Program Manager

Ms Pam Mitchell, Senior Finance Manager

Ms Margarita Sagris, Operations Manager and Executive Assistant to the CEO

Ms Dina Vlanes, Administration Officer

Ms Meghan Weekes, Senior Program Manager

# Investments and financial report

## Framework

The will of Roy Everard Ross provides the Trustees hold on trust the balance of the “real and personal estate” of Mr Ross remaining after payment of debts, expenses and duties following his death, in order “to pay or apply the income there from in perpetuity...”.

The will authorises the Trustees to invest the Trust’s monies as they “think fit” and “to vary, alter, transpose and reinvest” monies.

The Trust is a tax concession charity, is registered for GST but is not a deductible gift recipient.

## Investments

### Investment objectives

The investment parameters set out the Trust’s investment objectives, which are to:

- a. generate a total return of CPI +4% p.a. over a rolling five-year period
- b. generate an appropriate balance between income and growth returns, bearing in mind that income generation is a key objective of the R E Ross Trust and imputation credits are refunded from the Australian Taxation Office. Income is to be distributed from the portfolio on a quarterly basis
- c. at least maintain the real value of the funds under management as measured by the change in the Consumer Price Index (CPI) over a five-year rolling period
- d. tolerance for a negative return is one in every six years.

### Investment policy

The Trust’s Investment Manager for the 2019-20 was Evans & Partners. The Investment Manager is authorised to direct the investment and reinvestment of such monies as are allocated by the R E Ross Trust in an actively managed diversified portfolio.

The following sectors/industries are not approved for direct investment in companies whose principal purpose is to invest in:

- armaments
- alcohol
- gambling
- tobacco
- coal seam gas.

## Investment reporting

The Investment Manager provides written reports on a quarterly basis and for the financial year as a whole.

The market value of the investments was \$48.966 million at 30 June 2020.

## Investment performance

A gross return of 0.33 per cent was achieved for the 2019-20 year.

## Financial information and reporting

For the year ended 30 June 2020, the Trustees prepared a special purpose financial report on the R E Ross Trust and its controlled entity, Hillview Quarries Pty Ltd.

The information contained in this financial report is drawn from the audited accounts of the R E Ross Trust for the period 1 July 2019 to 30 June 2020.

## Payment of income as grants

Income paid and payable as grants during the year totalled \$4.399 million (2019 total: \$4.23 million).

## Expenses

Expenses comprise the three categories listed below:

- investment of the funds of the trust, including activities of Trustees, staff and payments to third parties
- activities of Trustees, staff and third parties directly related to the application of the income of the Trust to charities and for charitable purposes
- administration of the Trust, including all activities of Trustees, staff and third parties not directly related to investing activities or to application of the income of the Trust to charities and for charitable purposes.

## Auditors

The auditor for the R E Ross Trust and R E Ross Nominees Pty Ltd and its subsidiaries is Pitcher Partners.

## Statement of Comprehensive Income for the year ended 30 June 2020

(extract from 2019-20 audited accounts)

	Note	2020 \$	2019 \$	
<b>Revenue and other income</b>				
Revenue from continuing operations	5	5,678,469	7,445,000	-24%
<b>Less: expenses</b>				
Employee benefits expense		(741,452)	(695,563)	
Depreciation expenses		(34,066)	(15,918)	
Other Expenses		(761,714)	(807,504)	
		<b>(1,537,232)</b>	<b>(1,518,985)</b>	
<b>Operating surplus prior to granting</b>		4,141,237	5,926,015	-30%
Grants paid during the year		(4,399,272)	(4,233,773)	
<b>Net profit/loss from continuing operations</b>		(258,035)	1,692,242	

## Statement of Financial Position as at 30 June 2020

(extract from 2019-20 audited accounts)

	Note	2020 \$	2019 \$
<b>Current assets</b>			
Cash and cash equivalents	8	732,776	1,361,245
Receivables	9	3,230,141	4,015,078
Investments	11	48,966,361	49,189,780
Other assets		473,744	-
<b>Total current assets</b>		<b>53,403,022</b>	<b>54,566,103</b>
<b>Non-current assets</b>			
Receivables		5,432,592	5,432,592
Other financial assets	11	714,008	1,010,531
Property, plant and equipment		2,524,952	2,522,831
Intangibles		37,674	55,255
<b>Total non-current assets</b>		<b>8,709,226</b>	<b>9,021,209</b>
<b>Total assets</b>		<b>62,112,248</b>	<b>63,587,312</b>
<b>Current liabilities</b>			
Trade and other payables	16	346,128	510,185
Provisions		83,427	54,972
<b>Total current liabilities</b>		<b>429,555</b>	<b>565,157</b>
<b>Non-current liabilities</b>			
Provisions		-	-
<b>Total non-current liabilities</b>		<b>-</b>	<b>-</b>
<b>Total liabilities</b>		<b>429,555</b>	<b>565,157</b>
<b>Net assets</b>		<b>61,682,693</b>	<b>63,022,155</b>
<b>Trust funds</b>			
Residuary estate funds		42,855,066	43,936,493
Other reserves		16,554,030	15,725,264
Accumulated surplus		2,273,597	3,360,398
<b>Total trust funds</b>		<b>61,682,693</b>	<b>63,022,155</b>

## Statement of Financial Position as at 30 June 2020

(extract from 2019-20 audited accounts)

	2020 \$	2019 \$
<b>Note 5: Revenue</b>		
Royalties and fees from Hillview Quarries Pty Ltd	740,250	1,155,418
<b>Other Revenue</b>		
Dividend income and imputation credits refunded		
- Hillview Quarries Pty Ltd	2,682,527	3,635,351
- Investment portfolio	1,742,573	2,016,310
Interest income	513,119	637,921
<b>Total Revenue</b>	<b>5,678,469</b>	<b>7,445,000</b>
<b>Note 8: Cash and Cash Equivalents</b>		
Cash at bank and on hand	315,998	520,855
Cash on deposit	416,778	840,390
	<b>732,776</b>	<b>1,361,245</b>
<b>Note 9: Receivables</b>		
<b>Current</b>		
Trade debtors	992,534	1,474,510
Other receivable	2,225,012	2,540,568
	<b>3,217,546</b>	<b>4,015,078</b>
<b>Note 11: Investments</b>		
<b>Current</b>		
Investment portfolio	<b>48,966,361</b>	<b>49,189,780</b>
<b>Non Current</b>		
Private company shares	164,008	164,008
Investment portfolio	550,000	846,523
	<b>714,008</b>	<b>1,010,531</b>
<b>Note 16: Payables</b>		
<b>Current</b>		
<b>Unsecured liabilities</b>		
Trade creditors	226,384	258,998
Sundry creditors and accruals	119,744	251,187
	<b>346,128</b>	<b>510,185</b>

# Hillview Quarries

A valued member of the local community for more than 50 years.

As a wholly owned subsidiary of the Ross Trust, 100 per cent of Hillview Quarries' net profits are distributed through the Trust's granting strategy.

In addition to the Trust's granting funds, Hillview Quarries also provides financial assistance and quarry product donations and sponsorships to local organisations on the Mornington Peninsula throughout the year.

Since 1969, Hillview Quarries has been an extractive industry operator in Dromana on the Mornington Peninsula. For more than 50 years, it has supplied superior brown and grey granite products to local, state and federal government authorities, private contractors, retail garden supply outlets and the general public.

Hillview Quarries has had a long history of understanding the sensitivities associated with the environmental needs of its sites and of community expectations by carefully managing the operation, the ecology (flora, fauna) and waterways in its surrounds.

As the approved resources at the Hillview Quarry Drive site are nearing exhaustion, Hillview Quarries commenced plans to re-establish quarrying operations at Boundary Road and access adjoining new resources at the Boundary Road Quarry site, which contains an extensive quarry resource. This site is just over 800 metres (to the east) from the existing Hillview Quarry Drive site.

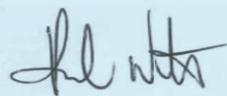
In 2018, Hillview Quarries commenced the process to gain a new approval to re-establish quarry operations at the site in Boundary Road. The Minister for Planning advised an Environment Effect Statement (EES) was required for the project under the *Environment Effects Act 1978*. The scope of work required to complete the EES was advertised for public comment and subsequently approved by the Planning Minister in April, 2019.

This assessment includes approximately 17 different studies including a large range of scientific, economic, and social studies to assess the ecology, visual, landscape, traffic, and noise, to name a few. This will provide a scientifically factual basis for the assessment of the Boundary Road site and its surrounds. From this, further assessments will be made of the likely impacts and mitigation of these impacts, should the re-established quarry be approved. The preparation and decision of an EES is likely to take another 18 months and will involve expert independent scientific studies and regulatory reviews.

Community engagement has been pivotal throughout the entire process. This began with a local community group formed to conduct regular round table discussions and information sharing to provide valuable input into the project status and summary updates on the various existing conditions reports.

As the impact studies and mitigation measures are conducted, an independent panel will hear all the evidence (studies), including public submissions. It will provide a report to the Planning Minister with recommendations. The Planning Minister will then assess the panel report, release an assessment and conditions and, if successful, then the statutory decision makers will issue approvals.

In the 2019-20 year, Hillview Quarries made cash donations and sponsorships of \$101,920 and product donations of \$18,481 to local organisations, bringing the amount gifted by the Ross Trust and Hillview Quarries to the Mornington Peninsula community to more than \$19 million.



**Paul Nitas**

Chief Executive Officer, Hillview Quarries



In the 2019-20 year, Hillview Quarries provided donations or sponsorships to the following organisations:



- Association for Building Community in Dromana Inc (ABCD)**  
Flyers for the first annual 2020 Chrome bumper car show  
**\$350**

---

- Balnarring Pre-School & Infant Welfare Association**  
Womindjeka Balnarring Ngargee support of annual festival  
**\$2,000**

---

- Bunjilwarra**  
Production donation to complete new running track  
**\$2,445**

---

- Cranbourne Park Primary School**  
Material for creation of Indigenous Bush Tucker Garden  
**\$364**

---

- Crib Point Fire Brigade**  
Product donation for the grounds of the new fire station  
**\$508**

---

- Crib Point Football Netball Club**  
Signage sponsorship for 2020 season  
**\$1,000**

---

- Dromana Australia Day Inc**  
Towards the 2020 Australia Day event  
**5000**

---

- Dromana College**  
Dromana College Scholarship program  
**\$3,000**

---

- Dromana Fire Brigade**  
Product donation for maintenance work  
**\$306**

---

- Dromana Football & Netball Club**  
2020 Sponsorship season  
**\$15,000**

---

- Friends of Jackson Way Reserve (Mornington Peninsula Shire)**  
Jackson Way Bushland Research (3 year project)  
**\$9,620**

---

- Gunnamatta Life Saving Club**  
Track repair work  
**\$465**

- Hastings Football Netball Club**  
New ground sign for 2019 season  
**\$600**

---

- Hillview Community Reserve and Habitat Restoration Fund**  
Management of Hillview Community Reserve  
**\$10,800**

---

- Inghams Growers Association**  
Donation towards the 25th annual award night  
**\$997**

---

- Kunyang Pre School**  
Product donation  
**\$368**

---

- Lions Club of McCrae**  
New catering equipment and barbeque trailer  
**\$5,000**

---

- Main Ridge Bowls and Petanque Club**  
Cafe blinds for newly installed shelter  
**\$1,000**

---

- Main Ridge Bowls and Petanque Club**  
Sponsorship for 2019-20 season  
**\$500**

---

- Main Ridge Pony Club**  
Sponsorship for 2019 training competition  
**\$80**

---

- McCrae Homestead**  
Product  
**\$834**

---

- Moorooduc Primary School**  
Product donation towards new safe space garden  
**\$136**

---

- Mornington Primary School**  
Product donation for new garden chicken sheds  
**\$772**

---

- Mornington Football Netball Club**  
Signage sponsorship for 2020 season  
**\$1,000**

---

- Mount Erin College**  
Product  
**\$605**

---

- Nepean Special School**  
Product donation for new car park  
**\$2,600**

- New Peninsula Men's Shed**  
Product to build new men's shed  
**\$500**

---

- Pearcedale Fire Brigade**  
Sponsorship for 17th Community Golf Day  
**\$200**

---

- Pearcedale Fire Brigade**  
Sponsorship for the 2020 Calendar  
**\$220**

---

- Rangebank Primary School**  
Armour rocks for new safe space play area  
**\$415**

---

- Red Hill Agricultural & Horticultural Society**  
Sponsorship for the 92nd Red Hill Show  
**\$7,000**

---

- Red Hill & District Memorial Preschool**  
Annual fundraiser  
**\$1,026**

---

- Red Hill Consolidated School**  
Product donation for car park and driveway access  
**\$3,031**

---

- Red Hill Country Fire Authority**  
Donation towards the upgrade of the CFA station  
**\$10000**

---

- Red Hill Show**  
Product donation for repair work to grounds  
**\$331**

---

- Rosebud & District Men's Shed**  
Product donation  
**\$420**

---

- Rosebud Beach Community Bowls Club**  
Sponsorship for the 2019-20 season  
**\$300**

---

- Rosebud Heart Soccer Club**  
Sponsorship for the 2020-21 season  
**\$3,000**

---

- Rosebud Primary School**  
Product for new peace garden  
**\$1,691**

---

- Rotary Club of Dromana**  
Contribution towards the purchase of a new BBQ trailer  
**\$1,500**

- Rye Football Netball Club**  
2020 season sponsorship  
**\$700**

---

- Rye Sports & Social Club**  
Sponsorship of 2020  
**\$1,500**

---

- SES Sorrento**  
Towards the purchase of a new trailer  
**\$5,000**

---

- Sorrento Bowls Club**  
Sponsorship for the 2019-20 bowls season  
**\$250**

---

- Sorrento Community House**  
Towards the Roger Penman Reserve playground  
**\$1,000**

---

- Sorrento Football & Netball Club**  
2020 Sorrento Sharks Club sponsorship  
**\$1,000**

---

- Southern Peninsula Community Support and Information Centre Inc**  
Purchase of a defibrillator  
**\$1,800**

---

- The Southern Peninsula Food for All**  
Toward the 2019 Christmas appeal  
**\$1,000**

---

- Victorian Farmers Federation - Mornington Peninsula Branch**  
Hay drive donation for drought and fire-affected farmers  
**\$10,000**

---

- Willum Warrain Aboriginal Association**  
Product donation  
**\$666**

---

- Woodworkers of the Southern Peninsula Inc.**  
Replacement of existing equipment used for community projects  
**\$2,500**

**Total 120,401.52**

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

**The Ross Trust**

Ground Level, Suite 2, 43 Agnes Street  
East Melbourne Vic 3002  
Telephone (03) 9690 6255  
[information@rosstrust.org.au](mailto:information@rosstrust.org.au)

