

Morialta Trust Inc. Annual Report

25th November 2019



Acknowledgement of First Peoples

The Morialta Trust Inc. Board acknowledges that we meet and conduct our business on the traditional lands of the Kurna people of the Adelaide Plains. We pay our respect to Elders past, present and emerging and acknowledge their continuing cultural and spiritual connection to the land, waters and skies. We also extend the same respect to other First Nations on whose land the activities of the Trust's distribution may extend to.

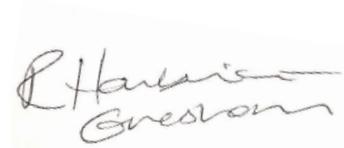
History and vision

The Morialta Trust fund celebrates more than 40 years of contributing to the lives of children, young people and their families in South Australia, and more than 70 years since its founders commenced this assistance. The Morialta Trust Inc. Board is made up of representatives of the founding members of the Trust: Uniting Church in Australia, Synod of South Australia; Baptist Churches of South Australia; Churches of Christ in SA & NT; The Presbyterian Church of South Australia and The Independent Order of Odd Fellows South Australia. Our vision is to support not for profit and charitable organisations working to support and bring lasting change to communities who need it the most so that all children and young people have opportunity to reach their full potential.

President's message

Firstly, a heartfelt thank you to the entire Morialta Trust community. There are many people who work tirelessly each year to achieve the vision of the Morialta Trust. From the Board members, to recipient organisation staff, there are countless hours dedicated to serving the community and needs of young people in South Australia. It has been a pleasure to hear the stories, see the work and feel the passion of everyone working towards a common vision.

Ruth Harbinson-Gresham
President
Morialta Trust Inc



Acknowledgements

The Governors of Morialta Trust Inc.:

- President: Ruth Harbinson-Gresham
- Vice President: David Berry
- Treasurer: Mathew Green
- Barry Samels
- Geoff Payne
- Gordon Bitter
- Lauren Noack
- Peter Russell, our incoming board member whom we warmly welcome

The **Board of Morialta Nominees** for their good stewardship in managing the Morialta Trust Fund and for their consistent spirit of collegiality on important operational and strategic matters.

Mathew Green for streamlining and updating the financial systems, and for completing all work required to complete the 2019 audit.

Julie Thomas, our office coordinator, for her work in supporting our online systems and for managing the grant administration.

All the **sponsors and supporters of Morialta Trust.**



“I continue to believe that if children are given the necessary tools to succeed, they will succeed beyond their wildest dreams!”

David Vitter, Former U.S. Senator

Partnership with Morialta Nominees

Positive relationships continue between the two Governing Boards of the Morialta Trust as we work towards a more efficient business structure and operating model. This work has included exploring skills-based board options, whilst retaining our constituent elected members who will remain the sole shareholders of the Trust.

Improvements to the rating of applicants and recommendations to the trustee

Once again there has been discussion and rigor around how we rate grant applications. The online application process was refined this year. It continues to provide rich data about each organisation and allows Governors to collaborate on the applicant assessment and rating process.

Following the 2019 grant season, we have further assessed the application and review process for continuous improvement opportunities which will be implemented as appropriate.

An assessment tool for the acquittal process has also been created online and is ready to be utilised.

Successful applicants

The Morialta Trust Board reviewed nearly 40 funding applications and made 17 recommendations to Morialta Nominees for final funding approval. An 18th recipient continues from last year's multi-year funding pilot.

Unsuccessful applicants were notified at the end of August and successful applicants were notified in the second week of September.

A total of \$473,374, was approved by Morialta Nominees to be distributed to the 18 groups. All funding distributions were completed by 25th November 2019. A complete list of groups funded is provided on page 6.

The **KeyInvest - Odd Fellows Foundation** utilises the Morialta assessment platform to review applicants and select one organisation each year to fund. The Morialta Trust welcomes this partnering opportunity.

Applicant ratings were close this year, so MTI used a trim tool to determine variations in average ratings. This removed the highest and lowest rating out of each assessed category, with the remaining ratings being averaged. Ultimately, trimming made little difference to rankings and overall recommendations did not change.

Ongoing work

We continue to review and improve our online application and review platform. This includes simplifying and categorising questions to capture additional relevant data and support our robust assessment process.

Our website has been given a face lift with plans to continue making this a vibrant and informative page. This includes sharing engaging stories about our recipient organisations' work and embedding an online donations link.

We continue to work towards a new governance structure. As we do so, a number of governance documents need updating which has commenced.

We have a presentation and networking evening on Friday 6th December 2019. This will provide us the opportunity to meet supporters and hear first-hand from recipients about their projects.

The restructure work continues with the plan that we become one fit-for-purpose operating structure with sound financial stewardship and thoughtful selection of recipients.

We will continue to streamline and simplify our online environment and sharing of files.



“Children are human beings to whom respect is due, superior to us by reason of their innocence and of the greater possibilities for their future”

Maria Montessori



2019 SUCCESSFUL RECIPIENTS

Australian Refugee Association

Backpacks4SAKids

Can Do 4Kids (Townsend House Inc.)

CanTeen

Carelink Ministries Inc

CareWorks (Churches of Christ in SA & NT
Community Care Inc.)

Centacare Catholic Family Services - Malvern Place

Grandparents for Grandchildren

Habitat for Humanity Australia SA

Kornar Winmil Yunti Aboriginal Corporation

Operation Flinders Foundation Inc

Oz Harvest

Riding for the Disabled Association SA Inc

The Epilepsy Centre of SA & NT

The Humour Foundation

Wandana Community Centre - Centacare Catholic
Family Services

Westside Housing

Youth Opportunities Association (SA) Inc

18

Recipient
organisations in
2019



\$473,374

In 2019 funding to benefit
children, youth and their
families

Over

14,500

Children, young
people and their
families benefited

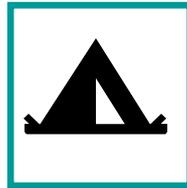


“Children are the living messages
we send to a time we
will not see.”

John F. Kennedy, 35th President of the United States

Funding Profile

Types of programs*



10.8% Camps

15.7%
Skills &
employment pathways



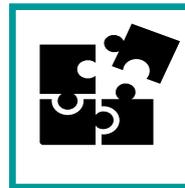
5.5%
Disability support

18.5%
Community development
and networking



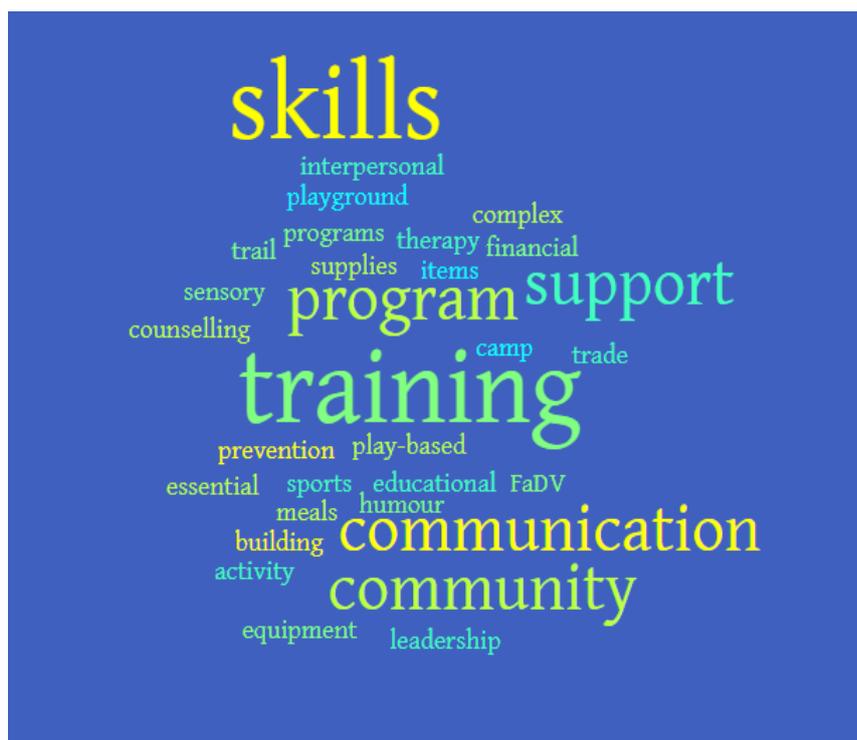
25.5%
Relief & support networks

8.7%
Family coping/
parenting skills

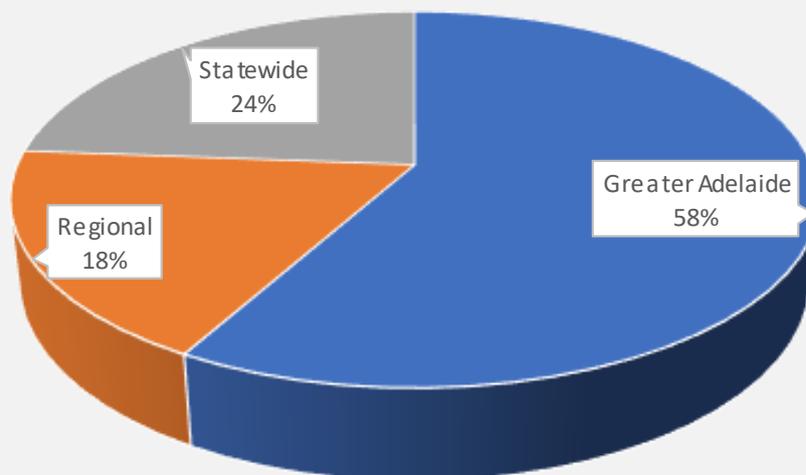


26%
Personal
development

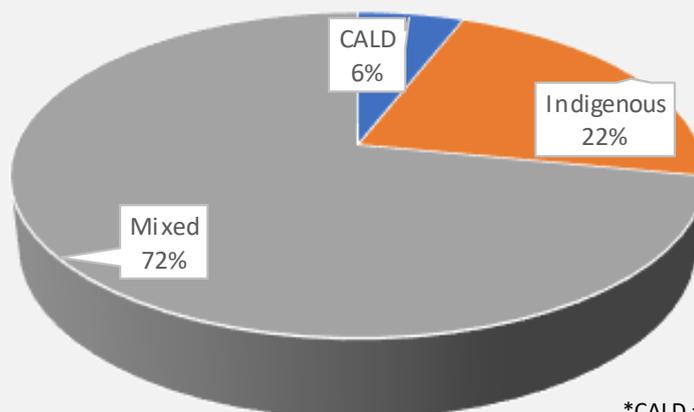
*Some programs are categorised into multiple program types therefore percentages do total 100.



Delivery Location

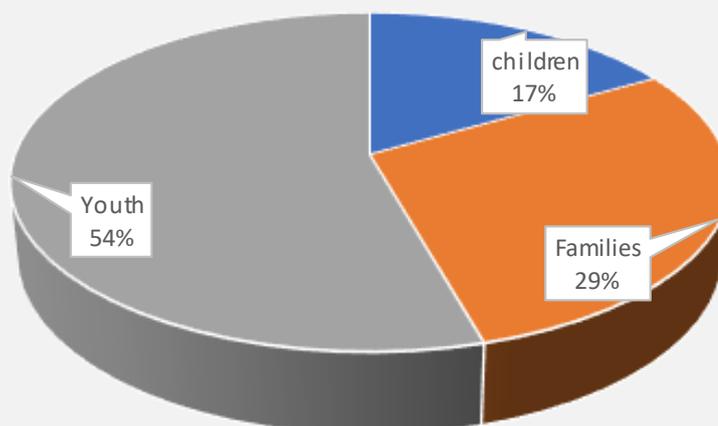


Profile of Groups Supported



*CALD = culturally and linguistically diverse

Target Demographic



Example of Project Outcomes

Personal development

Complex communication support

Skills development

Leadership training

Employment pathways

Wellbeing

Early intervention

Family strengthening

Capacity building

Financial acumen

Educational items

Emergency relief supplies

Link to support networks

“Children
are
one third
of our
population
and
all of
our
future”

Select Panel the for Promotion
of Child Health, 1981

2018/2019 AUDITED FINANCIAL REPORTS

Morialta Trust Inc
Morialta Trust Inc Fund
Morialta Charitable Trust Fund



Join the Morialta Trust Community



Please help support the work of the Morialta Trust in bringing wholeness to the lives of children, youth and their families in South Australia.

To support us go to www.morialtatrust.org.au