

Fresh approach for State Trustees Australia Foundation

This year State Trustees Australia Foundation (**STAF**) is introducing a new strategic grants program offering multi-year funding of up to \$100,000 per year, plus establishing a 'first-of-its-kind' consultative panel bringing together peak bodies representing ageing, disability and mental health.

The aim of the panel is to engage in cross-sector dialogue, collaboration and capacity building opportunities to help individuals, service providers and sector based organisations adjust to major ageing, disability and mental health sector reforms.

STAF will retain its annual grassroots grants program, but has introduced new funding themes to support a stronger focus on Ageing Well; Disability; and Mental Health and Emotional Wellbeing at both a grassroots and systemic level.

Funded from bequests to STAF, the focus of both grants programs is to promote social participation and inclusion, and to assist people who are potentially marginalised through age, physical or intellectual disability or mental illness to participate fully in economic, social and family life.

Previously, grants of up to \$10,000 were provided for grassroots projects, with around \$250,000 provided each year through an annual grant cycle.

This year marks State Trustees Australia Foundations' 20th year which, in conjunction with the receipt of a bequest in excess of \$10 million (STAF's largest to date), prompted a strategic review of its discretionary granting. Effective Philanthropy carried out the review and developed the subsequent five- year strategy.

STAF's new focus aims to enable a range of organisations and individuals to adapt to the new market-based, consumer-led service system in a positive way, and avoid people falling through the gaps during the reform's transitional period.



About State Trustees Australia Foundation

Established in 1994, State Trustees Australia Foundation (**STAF**) is a public charitable trust administered by State Trustees.

STAF is funded through bequests and promotes social participation and inclusion, and assistance to people who are potentially marginalised through age, physical or intellectual disability or mental illness to participate fully in economic, social and family life.

STAF has traditionally offered its annual Grassroots Grants Program. Grants are made each year from the proceeds of the foundation's investments with recommendations from an independent advisory committee presented to the State Trustees Board for determination.

Of the \$12 million distributed to charities since its establishment in 1994, more than \$2 million has been granted to nearly 250 projects through STAF's Grassroots Grants Program.

About the review

State Trustees Australia Foundation (STAF) reviewed its discretionary grant making strategy across three core funding areas: Ageing Well, Disability and Mental Health & Emotional Wellbeing.

The review was triggered by STAF's 20th year celebration, and its recent growth in funds under management. The \$10 million bequest made by Mr John Shanahan has seen STAF's discretionary funds available for distribution more than double.

Effective Philanthropy conducted the review in consultation with STAF's Advisory Committee Members and relevant State Trustees employees, key peak bodies and service organisations across the areas of ageing, disability and carers support, as well as philanthropic funders and other subject matter experts.

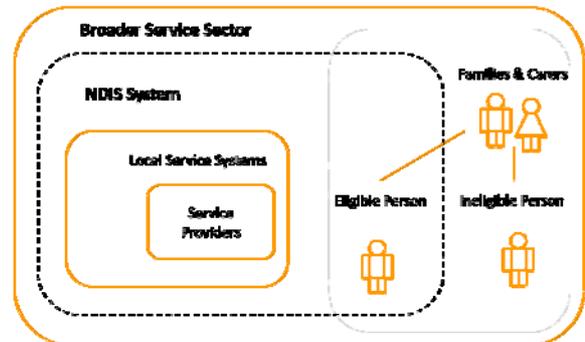


What impact will policy changes have on STAF’s funding priorities?

Policy and funding reforms mean that the ageing, disability and mental health sectors are entering a phase of large scale transformation.

Governments have initiated a number of reforms including "Living Longer. Living Better" reforms in the aged care sector, the introduction of the National Disability Insurance Scheme (NDIS) and Commonwealth and State based reforms to community mental health funding.

Key Focus Areas



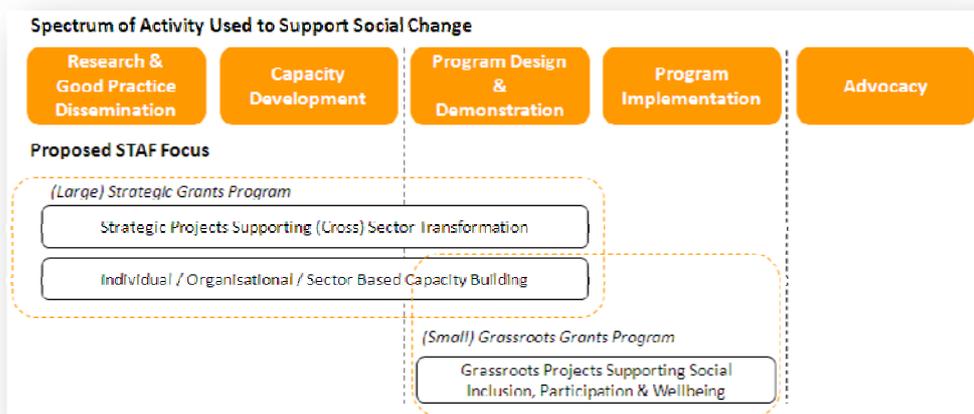
These reforms support a shift to a more competitive, market-based service system. The reforms recognise the importance of placing the person at the centre of the service system and the need to provide individuals with choice and control of how they engage with the service system.

They also acknowledge the long-term personal and economic benefit of supporting prevention and early intervention strategies across the life course to mitigate adverse health and wellbeing outcomes over time.

What’s changing?

For STAF this means that the grassroots and strategic needs for individuals, service providers and support organisations are changing. Over the next five years, a large Strategic Grants Program and a small Grassroots Grants Program will enable STAF to:

- Respond strategically to the current fast changing environment by supporting systemic change at an individual, service provider and sector-based level;
- Continue to effectively support and promote social participation and inclusion, and
- Assist people at a grassroots level who are potentially marginalised through age, physical or intellectual disability or mental illness to participate fully in economic, social and family life.



Strategic Grants Program

The large *Strategic Grants Program* aims to support the constructive transformation of the ageing, disability and mental health sectors associated with the implementation of the NDIS and related sector reforms.

It seeks to do this by providing four to five annual grants of between \$50,000 and \$100,000 for multi-year funding initiatives, up to a maximum of three years. It is proposed that granting in this larger grants program will be informed and guided by the strategic projects list to be developed by the consultative panel.

Grassroots Grants Program

The small Grassroots Grants Program aims to promote social inclusion, and provide support for individuals to live independently and build and maintain physical, emotional and spiritual wellbeing and resilience, as well as reduce the incidence of adverse health issues that can limit their ability to live well.

The Grassroots Grants Program will continue to provide grants of up to \$10,000 to eligible charities providing direct support.

Applications will be open throughout August each year for projects within Ageing Well, Disability or Mental Health & Emotional Wellbeing categories, and across the following six platforms of activity.

1. Individual, organisational and sector capacity building
2. Social inclusion
3. Social and emotional wellbeing and health promotion
4. Self-management / self-care
5. Social participation
6. Carer support

More information

A summary of the research is available from www.statetrustees.com.au/community/state-trustees-australia-foundation.

You can also follow State Trustees on LinkedIn and Twitter for the latest news on State Trustees Australia Foundation.

To sign up for updates about the grants or for more information about the research please contact charitabletrusts@statetrustees.com.au or phone (03) 9667 6444.

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