



National Trust of Victoria Foundation Strategic Plan 2023-2030

To give the past a future

Together, we can protect and conserve Victoria's irreplaceable heritage.

Proudly supported by:

Perpetual 





Rippon Lea Estate, by Neisha Breen

The National Trust of Australia (Victoria)

The National Trust of Australia (Victoria) is a charitable, community-based organisation. Our mission is to champion Victoria's diverse heritage, embrace the complexity of the past, and inspire connections to place for the benefit of current and future generations.

We are dedicated to conserving significant heritage buildings and places, nurturing historic gardens and environments, and preserving important art and heritage collections, for the benefit of the wider community.

Since commencing in 1956 we have been privileged to receive support from generous people who understand the importance of cultural heritage.

However, much of our cultural heritage remains at risk and continues to require significant financial support to secure and protect it for the future. That is why the National Trust of Victoria Foundation was created.



The National Trust of Victoria Foundation – What we do



The National Trust of Victoria Foundation (the Foundation) was established in 2011 to accept financial gifts, donations, bequests and raise funds.

We work with individuals, families, corporate and philanthropic organisations to do this and promote giving. All capital is preserved in perpetuity in an endowment fund to support the long-term sustainability of the National Trust of Australia (Victoria).

The Foundation is a separate legal entity established under the Charities Act as a vehicle for philanthropists and donors to realise their charitable purpose through giving. This includes the ability for donors to direct donations to a particular property or project.

Philanthropy and giving enables benefactors to define their legacy and have a sustainable impact into the future. Donors' acts of generosity are acknowledged through the Foundation's Deductible Gift Recipient (DGR) status for tax deductibility purposes. Generous gifts are also acknowledged on the website and in the Honour Roll.

The Foundation makes annual financial distributions for important conservation and preservation projects for heritage places and collections. These projects give the past a future, and are published in the National Trust magazine.

Our donors and benefactors have a powerful impact. They are incredibly important to the economic health, sustainability, and vitality of our cultural heritage, which has the proven power to improve and enrich lives across generations. Please join with us and become legacy creators.

Why we do it

We support the National Trust's significant heritage buildings and places, historic gardens and environments, art and heritage collections, and social history, to enable a future that is enriched by the past, so our cultural heritage is valued and shared by future generations.

However, we cannot do that alone. Much of our cultural heritage, whether built, natural or places of historic beauty, remains at serious risk.

Did you know that the National Trust of Australia (Victoria):

- cares for and maintains 41 heritage properties and their art and heritage collections
- preserves and manages historic gardens, nature reserves, farmland, Indigenous landscapes including those with rare remnants from pre-European settlement, and large parklands used as public open space, that contain significant registered trees
- conserves and curates more than 35,000 historic items in our house museums and collections, including works of art, objects of daily living and historic items with provenance.

There is a significant funding and resourcing gap for this vital work - which is why the Foundation needs your help now. Why - because left unprotected and cared for, this irreplaceable heritage will be irrevocably lost forever.

By acting now, you can ensure that those that come next can experience and enjoy our irreplaceable heritage and Give the Past a Future.

Before and after - Foundation supported stables restoration at Mooramong.



Before and after - Foundation supported Kinkanarami wallpaper restoration at Rippon Lea Estate.



What we want to do and how we will do it

Support of the Foundation, will assist to protect our vital cultural heritage into the future.

With your support we will:

- double our corpus to reach \$6 million by 2025, with a longer-term goal of \$20 million by 2030
- double and then triple our donor, corporate and philanthropic supporter base through proactive and connected engagement
- double our Bequest Program through a shared understanding and promotion of our purpose and cause
- increase our grant distributions for heritage conservation projects
- engage and report to our donors to demonstrate the impact of their support.

In leading this work, we will reflect the values of respect, collaboration, appreciation and integrity of the Foundation and its supporters.



Conservation work at Barwon Park.

Strategic plan and pillars

Our Strategic Plan 2023-30 is designed to connect, engage, inspire and grow. The plan is based on three strategic pillars:

STRATEGIC PILLAR 1



Connect & engage

Connect and engage through inclusion

We will seek out and develop new relationships to include potential donors and benefactors who have an interest in cultural heritage and philanthropy and inform them about the opportunities and impact of the Foundation's work.

Measures:
Extent of reach and number of new relationships.

STRATEGIC PILLAR 2



Inspire & grow

Inspire and grow through economic health and sustainability

We will continue to build the profile of the Foundation to attract donors and become a destination of choice for individuals and organisations to realise their philanthropic and legacy-making goals. We will share inspirational stories about donors and benefactors to inspire interest and demonstrate the impact and legacy of philanthropic support to our economic health and sustainability.

Measures:
Number of donations and total donation amount.

STRATEGIC PILLAR 3



Build reputation & performance

Build reputation and performance to support our cultural vitality

We will continue to build a reputation based on trust and performance through effective stewardship and governance to safeguard financial resources and ensure robust long term performance for our cultural vitality.

Measures:
Investment performance.

Our performance across these three pillars will be measured and reported in our annual report.



**National Trust of
Victoria Foundation
Directors**

Kristin Stegley AM,
President

Patricia Burke OAM
Barry Janes

Angela Tomisich

Generations to come will look back and thank the passionate people who stood up for preserving our significant buildings and parklands by contributing to the National Trust of Victoria Foundation. If you join us in supporting the Foundation you will be reaching out and touching the hearts and minds of the future.

'Historically, culturally, architecturally, our heritage places are of great significance. They need and deserve strong community and philanthropic support to ensure their preservation for future generations to enjoy. Please join me in supporting this exciting opportunity through the National Trust of Victoria Foundation.'

Simon Molesworth AO KC, Patron & Former Chairman,
National Trust of Australia (Vic)

'Our heritage environment provides links with the past from which we can draw sustenance. Memories, cultural associations, and our sense of personal, local identity are strengthened. People that join is supporting the Foundation will be making history through saving it'

The late Weston Bate OAM, Author & Historian



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