



The Albert Coates Memorial Trust

**Annual Report
2020-21**

ABOUT THE ALBERT COATES MEMORIAL TRUST

The Albert Coates Memorial Trust is a volunteer run, Ballarat-based organization which, since 1998, has raised funds to present scholarships for medical purposes, with a strong emphasis on regional areas.

The scholarships are awarded in areas of interest and relevance to the life and achievements of Sir Albert Coates, the Ballarat-born surgeon of the Thai-Burma Railway.

STATEMENT OF PURPOSE

The Albert Coates Memorial Trust provides tertiary level scholarships for health professionals in regional Australia. The Trust honours the life of Sir Albert Coates through publications, education programmes and associated educational awards. Trust programmes are supported by donations, bequests and fund-raising activities.



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TRUSTEES



Don Moss
Chair



Roger Trudgeon
Hon. Secretary



Neil Shiells
Hon. Treasurer



Rudy Novotny
Retired at 2021 AGM



Shirley McIver
Trustee

COMMITTEE MEMBERS



Bill Bahr



Desley Beechey



Arthur Coates



Robyn Coates



Ed Davis



Gwenda McManus



Roger Mitchell



Jeff Sargent

HONORARY PATRON



Walter Gherardin OAM

RETIREMENT OF RUDY NOVOTNY

After more than seventeen years of service to the Coates Trust, Rudy Novotny has retired from being a Trustee. Rudy has been Treasurer of the Trust but has also brought great wisdom and foresight to trust deliberations. Everyone connected with the Trust is greatly appreciative of all that he has done.



CHAIRMAN'S REPORT – Don Moss

OAM
FRACS FACS

As for much of Australia, 2020-21 has provided many difficulties for the workings of the Albert Coates Memorial Trust. We have been unable to have the Coates Oration, the dinner following the oration, or the Annual luncheon address. These functions each contribute to our public visibility, and to our fundraising.

Concurrently, the funds able to be provided by the Victorian Veterans Council, have reduced considerably. These funds are provided from the capitol interest earned on money raised by the Legion of Ex-Service Men and Women. Interest rates have dropped precipitously, so that the funds allocated for 2020-21 will be \$21,000, dropping to \$14,000 next year and predicted to be \$7000 the following year.

The ACMT has a scholarship programme that has averaged scholarship totals annually of \$42,170 over the last 10 years. Many of the recipients have been descendants of ex-servicemen, or serving members. Sir Albert Coates was always enthusiastic for education of the younger community members training for the medical and nursing professions. We remain determined to continue the scholarship programme in his name, but clearly need additional alternate funding sources until the interest on the Patriotic Funds lifts sufficiently.

I am delighted to report that the McIver Family Trust has become a major supporter, and the Leckie Family donation has enabled us to support a new training scheme for Neonatal Nursing Scholarship at Ballarat Health Services. This will enable premature babies born in the Western region to access skilled specialist nursing care, that would otherwise necessitate transfer of the babies and mothers to Metropolitan Melbourne.

W&D Finance, and the Coates Family remain valued supporters.

We appreciate the support of all our donors, and are reassured that the reputation of Sir Albert Coates for his work for POW's on the Burma-Thailand railway continues to grow.

The Committee work of the Trust is entirely voluntary, and each of the members serve various roles in selection of scholarship recipients, and for publicity of the work of the Trust.

We were sad to note that two previous Committee members, Lorna Morgan and Marie Pryor, have died during this year. Lorna had been a theatre nurse for Coates at Fairfield Hospital during the 1960's, and Marie was the wife of our Founding Chair Mr Jim Pryor FRACS.

Fortunately we have gained Bill Bahr and Jeff Sargent, both Ex-Veterans, as new Committee members.

It is salutary to note that infectious diseases were a major problem causing death on the Burma-Thailand railway, including malaria, cholera, typhoid, and amoebic dysentery. Drugs were rarely available, and these specific diseases, and sepsis from gangrene, were life-limiting. Today we have ample antibiotics, yet Covid-19 has been the cause of over 4 million deaths world-wide, and certainly disrupted normal life patterns. Fortunately effective vaccination looks to be changing outcomes, and hopefully we will be able to resume normal life activities in the near future.

Don Moss



SECRETARY'S REPORT—Roger Trudgeon

MA (Museum Studies)

The last financial year has presented a significant challenge for the usual operations of the Trust. The committee and Trustees have continued to meet on Zoom and communicate at a distance. With the cancellation of the Lunch with Speaker and the Oration functions, important promotional and fund-raising activity was curtailed. It was unfortunate that scholarship recipients have not been able to be publicly acknowledged at the Oration function.

The Trust was very fortunate, however, to gain several significant donations that have enabled the continuation of the full scholarship program, with some minor adjustments to the requirements of practical placements funded in some scholarships. Our thanks go out to ongoing sponsors, the Glenys McIver Trust and W&D Finance for their generous support. As the Sebastopol Bowling Club was closed for extended periods in 2020 and 2021 they were not able to assist us, however Robyn and Arthur Coates kindly replaced that support with their generous donations.

The Trust acknowledges the support of the Victorian Veterans Council (VVC). The low interest rates are having an increasingly serious impact on the income received from the VVC's invested funds left to the Trust by the Australian Legion of Ex-Service Men and Women. The Trust is continually addressing this challenge. Several other very generous individual donors have ensured the Trust's obligations to fund the scholarship program could be met. We thank all our supporters in these trying times.

The new Special Care Nursing Scholarship at Ballarat Health Services was able to commence in 2021, with the first scholarship of \$10,000 going to Deborah Parkinson. We are so grateful to the Leckie family for supporting a five-year program of awards at Ballarat Health Services.

Membership of the Trust saw the retirement of Rudy Novotny at the Annual Meeting in

September. His position remained vacant for the remainder of the financial year. We thank Rudy for his tireless service to the Coates Trust over so many years.

We are grateful to Neil Shiells for his work in taking on the Treasurer's role.

Two new members joined the Committee in 2021, in Bill Bahr and Jeff Sargent. Bill recently retired from a career in the financial services sector and having long-time connections with the military community. He is President of the Prisoner of War Memorial Committee in Ballarat. Jeff Sargent has worked as an orthodontist in Ballarat for many years. He has a background of 10 years working full-time in the RAAF as a dentist and has a strong interest in military history.

My thanks to all the Trustees and Committee members for their many individual contributions to the work of the Trust. Everyone has different roles to play, and this ensures a broad program of activity can be completed.

Despite the lockdowns in 2020, the Mount Pleasant Primary School Coates projects were still completed by the Year Six students and the prize money was equally divided amongst the 15 participants. Certificates were also provided for each student.

The pandemic continues to set challenges for the Coates Trust, but the need for its services are greater than ever with the financial challenges faced by students and the growing need for regional medical and nursing professionals. The Trust is committed to ensuring the provision of scholarships remains as our core priority.

Roger Trudgeon

TREASURER'S REPORT



With the present extremely low interest-bearing financial climate continuing to drop, the ACMT is pleased to again report a better performance than expected, in relation to Income, Equity and Scholarships granted during 2020- 21.

Although earnings from investment income are always an important factor, the Trust is managing its investments with a low to moderate risk factor, and periodic reviews.

Please refer to the following Tables, Charts, Comparisons and the Financial Audit Report for specifics details for the financial year.

It is noted that the Income for 2020- 21 was less than the previous year given the impact of low interest payments and loss of revenue due to the cancellation of all our fund raisers and the loss of some donors due to the Covid 19 Virus Pandemic.

Scholarships budgeted for the Financial Year at \$34,800 is lower than last Year. In order to maintain this level of Scholarships, the ACMT needed to contribute from its Corpus of Funds, built up over the years for such challenging times. Equity of the Trust includes \$50,000 from the Leckie family which is allocated for a new Nursing Scholarship to commence in 2021-22 financial year at \$10,000 per annum for 5 Years.

All donations received during the year are gratefully acknowledged.

These were numerous and significant. In

particular the Trust acknowledges the ongoing support of the Legion of ex-Service Men and Women through the Victorian Veterans Council who contributed \$14,000 this year.

This annual Donation is totally linked to prevailing Interest rates and consequently is reducing each year.

VVC has informed us it will drop to \$6,500 in 2021-22 and \$2,000 in 2022-23.

This highlights the need for the ACMT to widen its sources of funds.

However, other Donations have increased mainly due to a repeated donation from the Glenyis McIver Trust which doubled to \$20,000 making them our major sponsor.

Many other generous people's support has kept us on the right side of the balance line.

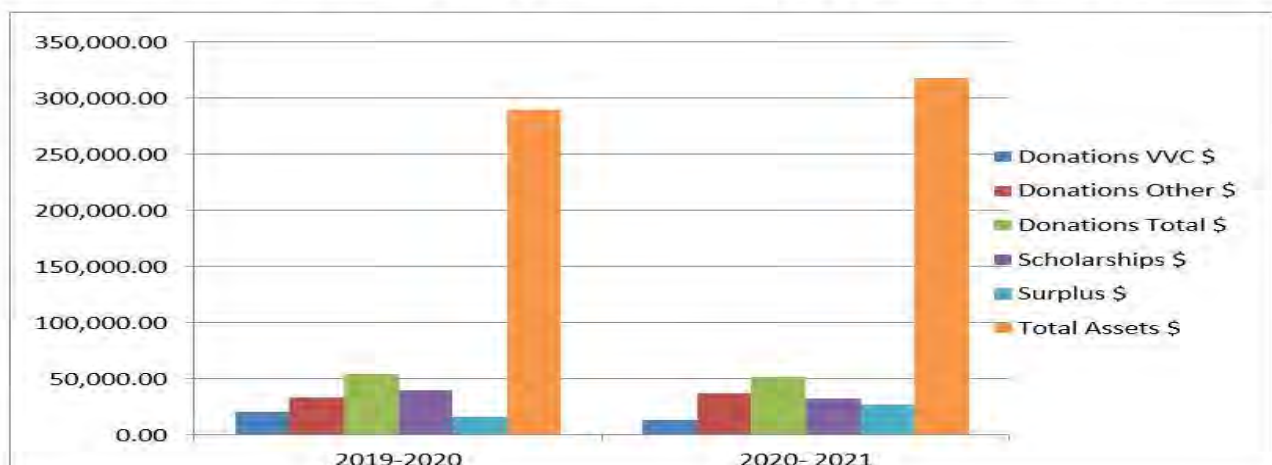
It is also relevant to mention that the 2020-21 annual W & D Donation was actually received last financial year and will not show in this report.

Our reporting responsibilities with the ATO, Australian Charities and Not-for-Profit Commission and the Victorian Veterans Council (Legion) are all up to date.

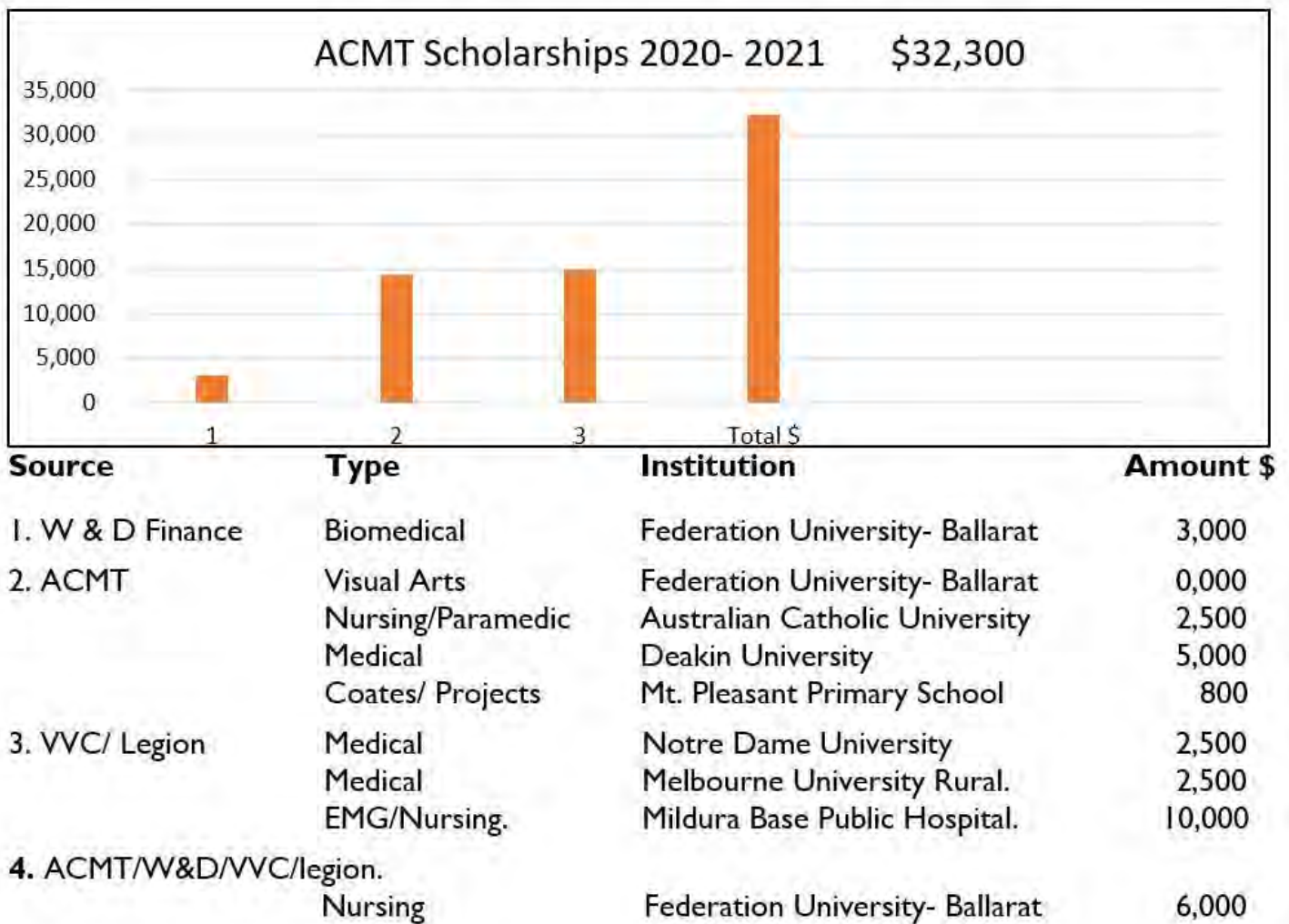
The Audited Accounts are attached to this report, it is appropriate to thank Sam Maskell CPA once again, for making himself available on a voluntary basis.

Neil Shiells

ACMT- Financial Comparison 2020- 2021



ACMT- Financial Comparison 2020- 2021 (cont.)



ACMT- Donations received Financial Year 2020- 2021

Total 51,355

Donor	Purpose	Amount \$
Various	<u>ACMT- General</u>	200
Laurence Prosser	ACMT- General	500
Wal Gherardin	ACMT- General	500
Robert Campbell	ACMT- General	500
Colin Prowse	ACMT- General	1,000
Shirley Prowse	ACMT- General	1,000
John Davis	ACMT- General	3,000
Sharon Moss	ACMT- General	5,055
A & R Coates	ACMT- General & Mt Pleasant Primary	5,600
VVC/ Australian Legion	Nursing and Medical	14,000
Glenys McIver Trust	To be determined	20,000

AUDITOR'S REPORT - SAMUEL MASKELL CPA



Albert Coates Memorial Trust

September 2021

AUDITOR'S/ TREASURER'S REPORT FOR FINANCIAL YEAR 2020-2021

The Statement of Profit & Loss and Balance Sheet for the ACMT is properly drawn up and gives a true and correct view of financial affairs and operations for the Year.

Income & Expenses (Summary).

	2019- 2020	2020- 2021	Change
Income	\$70,768.30	\$58,162.81	-17.8%
Expenses	<u>\$54,181.82</u>	<u>\$30,653.17</u>	-43.4%
Net Earnings	\$16,586.48	\$27,509.64	+65.9%
Donations	\$54,716.00	\$51,355.00	
Scholarships	\$39,800.00	\$32,300.00	
Total Assets	\$290,294.14	\$318,465.88	

Comments and Financial Highlights for the audit period:

- Donations from the VVC were \$14,000 in the reporting period, Private Donation were \$37,355.
- The Trust has NO financial Liabilities to report, the BAS/ GST reporting is completed quarterly.
- A previous year Scholarship Recipient refunded \$2,540, because it was Not fully utilized.

9 Scholarships/ Awards for 2020/21

\$32,300

▪ ACMT+W&D+VVC	Nursing	Federation University	\$6,000
▪ ACMT	Visual Arts	Federation University	\$0,000
▪ ACMT	Nursing/ Paramedic	Australian Catholic University	\$2,500
▪ ACMT	Deakin University	Medical	\$5,000
▪ Robyn & Arthur Coates.	Coates/ Projects	Mt Pleasant Primary School	\$800
▪ VVC/ Legion	Medical	Notre Dame University	\$2,500
▪ VVC/ Legion	Medical	Melbourne University Rural.	\$2,500
▪ VVC/ Legion	Emergency Nursing.	Mildura Base Public Hospital.	\$10,000
▪ W & D Finance	Biomedical	Federation Univ.- Ballarat	\$3,000

Samuel Maskell- CPA
Hon. Auditor

Neil Shiells
Hon. Treasurer

SCHOLARSHIPS and RECIPIENTS 2020 - 2021

University of Melbourne & Royal Australasian College of Surgeons Surgical Anatomy

Recipient: **Alex Chua**
Scholarship Value: **\$1000.00**

Surgical Anatomy

Recipient: **Deepika Gunda**
Scholarship Value: **\$1000.00**

Surgical Anatomy

Recipient: **Wesley Teoh**
Scholarship Value: **\$1000.00**

University of Melbourne/ Rural Health Sir Albert Coates Surgical Scholarship

Recipient: **Sarah Loria**
Scholarship Value: **\$2,500.00**

University of Notre Dame Australia

Surgical Elective

Recipient: **James Blomberg**
Scholarship Value: **\$2,500**



Federation University Biomedical Science

Recipient: **Mary-Lee Fenech**
Scholarship Value: **\$3,000.00**

2nd Year Nursing

Recipient: **Tammy Lee Chatwin**
Scholarship Value: **\$3,000.00**

2nd Year Nursing

Recipient: **Leanne Norrie**
Scholarship Value: **\$3,000.00**

La Trobe University Master of Nursing (Emergency),

Recipient: **Jeenmariam Lal**
Scholarship Value: **\$10,000.00**



Deakin University Surgical Elective

Recipient: **Bevan Hurst**
Scholarship Value: **\$2,500.00**



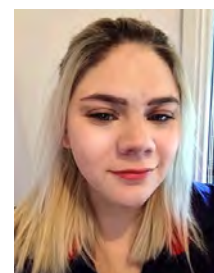
Surgical Elective

Recipient: **Elle-Louise Smith**
Scholarship Value: **\$2,500.00**

Australian Catholic University

Nursing Paramedic

Recipient: **Molly Davis**
Scholarship Value: **\$2,500.00**



Leckie Scholarship

Ballarat Health Services Neonatal Nursing

Recipient: **Deborah Parkinson**
Scholarship Value: **\$10,000.00**

Coates Projects, Mt Pleasant Primary School

Each year the Albert Coates Memorial Trust awards six monetary prizes to children in Year 6 at Mt Pleasant Primary School who complete projects on the life of Albert Coates.

Awardees for 2020 were:

First Prize – **Bryce Buist** (Sir Albert Coates Museum)

Highly Commended – **Payton Smith** (Sir Albert Coates 'Game of Life')

Group Projects

First Prize – Tess Hood, Indie Hunter, Freya Wollensack

Highly Commended – Paige Lacy, Scarlett Morriss, Noah Kargaran, Savannah Hussey-McDonald

Commended – Nathan Dubberley, Bayden Reyen, Johnny Burgess, Sasha Johnstone, Indya Bird-Prizeman, Quinn Hallagan

Sponsors

The Albert Coates Memorial Trust is grateful for the support of organisations which have sponsored scholarships and the many individuals who have given financial and practical support.



Victorian Veterans
Council



The Australian Legion of Ex-Service Men and Women has been the most generous contributor to the Trust's work through a major corpus of funds administered by the **Victorian Veterans' Council**. These funds support a variety of nursing and other scholarships.



W & D Finance continues to generously support the sponsorship of the Biomedical Science scholarship at Federation University Australia.



Since 2000, **Federation University Australia (Ballarat)** has been a key supporter in helping coordinate the promotion, selection and presentation of three Coates Trust scholarships.

In presenting the Coates Oration, it has kindly sponsored the production of invitations, mail outs and other costs. The Trust gratefully acknowledges the ongoing generosity of the University.



The Trust appreciates the generous support of the **Sebastopol Bowling Club** which sponsors the Mount Pleasant Primary School **Museum in a Suitcase** project awards.



Since 2001, the Trust has worked closely with the **University of Melbourne** and the **Royal Australasian College of Surgeons** in formally presenting the Sir Albert Coates Scholarship in the Postgraduate Diploma in Surgical Anatomy. The graduation ceremony at University House and social gathering afterwards is a great opportunity for Trust members and Coates family members to meet with academic staff and graduates of the course.



Glenyis Mclver, lived, worked, married, and made a huge contribution to many organisations in Ballarat during her life of 87 years. After her death in 2013 the Glenyis Mclver Charitable Trust was established which aims to support local Ballarat community organisations to make a difference in the Greater Ballarat Area. The Albert Coates Memorial Trust is extremely grateful for the generous donation received this year from the Glenyis Mclver Charitable Trust



The Trust is grateful to **Ballarat Legacy** for hosting the meetings of the Coates Trust and assisting in a variety of other ways.

As mentioned earlier, **The Leckie Family Donation** has enabled the Trust to support a new training scheme for Neonatal Nursing

Scholarship at Ballarat Health Services. In this photo, Neil Leckie is presenting cheque to Luke McEldrew, Special Care unit manager from Ballarat HS with Desley Beechley, an ACMT Committee Member along side the statue of Albert Coates in Sturt Street Ballarat.





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