



INFORMATION & FUNDING POLICY GUIDE FOR ORGANISATIONS SEEKING A GRANT

Grant Guidelines are designed to assist organisations which are seeking grants
Internet site: *Grant Guidelines* are available at the following Internet address:
<http://www.tasmaniancommunityfoundation.org>

APPLYING FOR A GRANT

As you would appreciate, there are always more applications for worthy projects than can be funded. It will help you and the Foundation, therefore, if you would read *Grant Guidelines* and the other guidelines to which reference is made before submitting an application. Please use the appropriate *Application* form referred to in the relevant section of the guidelines, provide all the information required and sign and date the form.

MAKING AN APPLICATION FOR A GRANT

We are trying to make it as simple as possible for you to apply for a grant. However, at the same time it is important that the Tasmanian Community Foundation has the information it needs to make its decision about your application. Consequently all applications must be made on the appropriate *Application* form. Unless otherwise stated in the guidelines, this is the *Grant Application Form* attached to *Grant Guidelines* and available at the Internet address shown on this page.

CLOSING DATES FOR APPLICATIONS

Closing dates will be shown in the relevant sections of the guidelines. Each grant *Application* must be received by the Community Foundation by the closing date when listed.

So that there is enough time to research applications before Grants Committee meetings, late applications will not be able to be accepted.

Board meetings are usually held within eight (8) weeks of the closing date of applications, however this is subject to change.

LODGEMENT: You may lodge your applications by email, delivery or post.

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**Post
or
delivery**

Email:
info@tasmaniancommunityfoundation.org
Please note that if you submit by email, you must also send separately a copy of your latest audited financial statements, annual report and evidence of current tax status.

The Executive Officer,
Tasmanian Community Foundation,
P.O. Box 2062, Launceston, TAS. 7250
Telephone: 0407 894 097
Fax: (03) 63741004

OTHER CHARITABLE TRUSTS AND FOUNDATIONS

Consult the *Australian Directory of Philanthropy* (ISSN 1321 - 0734) for other trusts and foundations which may be more suited to your requirements. For copies of the *Directory* contact *Philanthropy Australia*, Level 10, 530 Collins Street, Melbourne, Victoria 3000: telephone 03 9620 0200, fax 03 9620 0199 or email pa@philanthropy.org.au.

Please note:

- These guidelines, programs and closing dates are subject to change
- Before lodging your application you must check the website to make sure guidelines and closing dates are current
- It is the responsibility of the applicant to check closing dates and apply accordingly
- Applications not based on current guidelines and programs will not be accepted

Funding Guide:

The Foundation may fund the purposes listed under each sub-fund or Project.

The Foundation may not fund any of the following unless an exception is suggested under a particular sub-fund or Project:

- | | | |
|--|---|--|
| – bodies which are themselves grant-making agencies; | – debt retirement; | – individuals; |
| – budget deficits; | – equipment unless it is an integral part of an otherwise eligible project; | – sectarian or religious bodies where services are limited to their own members. |
| – building costs; | – general operating expenses; | – transport. |
| – conferences; | | |

How to apply for a grant:

You must complete the *Application Form* attached to *Grant Guidelines*. The name of the sub-fund or Project to which you are applying must be specified on the *Application Form* which must also be signed by a Board or staff member with appropriate authority.



Closing Dates will be 31st March and 30th Sept. or may be otherwise listed under each sub-fund or Project.

GRANT APPLICATION FORM

Your Organisation's Name:

Your Organisation's Postal Address:

Your Organisation's Street Address:

Organisation's Telephone Number:

Organisation's Facsimile Number:

Contact Person's Details [a] Name:

[b] Telephone Number:

[c] email address:

Organisation's ABN number and

Tax Status:

ABN number:

You must show that the Australian Tax Office has endorsed your organisation's tax status with effect from 1 July 2003 or later – either by its inclusion in legislation, its inclusion in a publicly accessible register, or by providing us with a copy of a letter from the Tax Office.

GST: Have you registered for the GST?

Please tick appropriate answer: YES [] NO []

Name of the Project for which you are seeking a grant:

Description of Project:

Amount (\$) of Grant Being Requested:

Year 1:\$

Y2:\$

Y3:\$

Total Budget for the Project or Activity:

Total Budget for your Organisation (for the current year):

Applicant's declaration:

I, (insert full name)

am authorised by the Organisation to make this application on its behalf and say that all the information provided is true and correct

Applicant's signature:

Date signed:



YOU MUST PROVIDE THE FOLLOWING DETAILS

- 1. History and Purpose:** Give a brief description of the history and purpose of your organisation.
- 2. Current Activities and Population Served:** Summarise the current programs and accomplishments of your organisation; and list the characteristics of the population that your organisation serves, for example, geographic location, socio-economic status, age.
- 3. Staff Numbers:** Number of paid full-time, part-time and casual staff, and volunteers.
- 4. Financial Statement:** Your most recent financial statement, audited if available. This statement should reflect actual expenditures and funds received during your most recent financial year.
- 5. Tax Status:** You must show that if you are applying for funds through the Public Fund that the Australian Tax Office has endorsed your organisation's tax status (as a deductible gift recipient) with effect from 1 July 2000 or later - by providing us with a copy of the letter of endorsement from the Tax Office. If you are applying through the Open Fund and your organisation's tax status is as an income tax exempt charity please provide us with a copy of the letter of endorsement from the Tax Office. Organisations may apply who are not currently a DGR or an ITEC to the Open Fund.
- 6. ABN Number and GST:** You must provide your ABN Number and answer the question on the Grant Application Cover Sheet. Grants made to organisations as gifts are freely given and would not ordinarily constitute consideration for taxable supply by recipients. The Australian Taxation Office [ATO] provides information on GST and grants on its website <http://www.taxreform.gov.au>. Information on GST and non-profit organisations forms part of the ATO's "Resolved Issues Document" (July 2001). Applicants and grant recipients are advised to seek further information from the ATO.
- 7. Directors' List:** A list of your Board of Directors, with their affiliations. Please identify which of your Board Members are employees or executive directors.
- 8. Annual Report:** Provide a copy of your most recent annual report.
- 9. Brief description of the project (or activity) for which your organisation is seeking a grant:** Summarise in no more than two pages [a] the project for which your organisation is seeking a grant, [b] its main purpose, [c] the need which is being addressed, [d] the methods or strategies which will be used, [e] the people who will benefit, [f] the outcomes you aim to achieve, [g] how the project will be sustained when the grant funds have been expended, and [h] where your organisation seeks funding for service delivery, evidence of your ability and expertise to deliver that service.



- 10. Project Time:** Anticipated dates of commencement and completion of the project.
- 11. Evaluation Measures:** Explain how and by whom the effectiveness of your project will be measured.
- 12. Budget:** Provide an itemised budget (income and expenditure) for each year of the project or activity. This is important in the event that your application can only be part funded. Indicate if you are seeking a grant for general operating funds.
- 13. Project Directors:** The names and qualifications of the individuals who will direct the activity or project.
- 14. Funding Sources:** Please list the Trusts, Foundations, corporations and other sources, including governments, from which you are seeking funding and to the best of your knowledge the status of each request.
- 15. Other Organisations:** What other organisations are doing similar work and in what way does your project differ from these other organisations?
- 16. Recent Grants:** Provide details of all grants which your organisation has received in the last three years.
- 17. Referees:** Provide the names and contact details (including telephone) of two individuals or organisations who would speak or write in support of the application if requested to do so by the Tasmanian Community Foundation.
- 18. Privacy:** Please attach your completed Privacy Statement and Consent (see next page)



PRIVACY STATEMENT AND CONSENTS

This statement applies to the Tasmanian Community Foundation Company Limited (ABN 23084188045), including committees and advisory panels that are appointed by the Board to which your grant application relates. It also applies to the terms of the Public Fund Trust Deed and /or the Open Fund Trust Deed. These together provide the Tasmanian Community Foundation with necessary information when considering your grant application.

Collection of personal information

In its application to the Tasmanian Community Foundation for a grant, your Organisation (the Applicant) gives the Tasmanian Community Foundation contact details and other personal information about directors and other key personnel (Individuals). In the future the Tasmanian Community Foundation, its researchers and advisors may obtain other information about the Individuals from the Applicant, from any of them, or from other sources. We may collect 'sensitive information' but only when it is necessary for the purpose of the Application. This is all "Personal Information".

Use of personal information

We use Personal Information for the primary purpose of assessing the Applicant's application, and if it is successful, to provide a grant to the Applicant.

We may also use Personal Information for our internal operations including accounting, record keeping, archiving, compliance monitoring and compliance with legislative and regulatory requirements.

Without some or all of your information, we might not be able to process your application.

If your application is not successful, we may hold Personal Information we collect in relation to the application for our records. If your application is successful, after the grant is completed we may hold Personal Information concerning the grant for our records. We will not continue to hold Personal Information if it is not necessary.

Disclosure of Personal Information

We may disclose Personal Information for the purposes set out above, to people and organisations who carry out functions for us, for example our agents and our researchers, any person you authorise, your legal advisers, any party to whom we are authorised or required by law to disclose the Personal Information, and any party to whom the person whose Personal Information we hold authorises us to disclose it.

Data quality

We take reasonable steps to make sure that the Personal Information we collect, use and disclose is accurate complete and up to date.

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Data security

We take reasonable steps to protect the Personal Information we hold from misuse and loss and from unauthorised access, modification or disclosure.

Access and correction to personal information

Subject to exceptions permitted by law, an Individual may obtain access to the Personal Information we hold about them by contacting the Foundation at the address set out below. An access fee may apply. If we are informed by an Individual the Personal Information we hold about them is not accurate, complete or up to date, we will take reasonable steps to correct it.

Where we receive and keep Personal Information about an Individual from another source, generally that person will have the same access to that information and it can only be used for the same purposes and shared with the same persons as the Personal Information that you give us. However, to the extent permitted by law, Personal Information that we receive from other sources will be kept confidential.

Informing Individuals

You must inform each Individual of the contents of this Statement and Consent. By signing the Application for a grant, you acknowledge you are aware of this Statement and, on behalf of each Individual, consent to sensitive information being collected if it is necessary for the purposes of the Application.

If you require any further information about privacy, please contact us:

Tasmanian Community Foundation,
P.O.Box 2062, Launceston. Tasmania. 7250.
Phone: 0407 894 097
Fax: (03) 63741004
E-mail: info@tasmaniancommunityfoundation.org

I have read the terms and conditions relating to the application for a grant from the Tasmanian Community Foundation, including this Statement and Consent to Use of Personal Information, and agree to those terms and conditions.

Signed: _____

Name (print): _____

Witness: _____

Date: _____

The Tasmanian Community Foundation acknowledges ANZ CHARITABLE TRUSTS Victoria, in their support in preparing this documentation.