

Fleurieu Community Foundation Community Wellbeing

Guidelines and Application

Dates applicable to this grant round

- Expression of interest released Friday 22nd March 2019
- Expression of interest closing Monday 13th May 2019
- Successful applicants notified Friday 31st May 2019
- Payments distributed 1st week of June
- Acquittal due to be returned Within 1 month of completion of the project

About The Fleurieu Community Foundation

The Fleurieu Community Foundation was established in late 2010 as a simple and cost effective way for people to invest in the future of our community.

The Foundation aims to build a substantial public fund that will benefit the Fleurieu community through grant making and awards programs. Money is raised through donations and fundraising - donations to the Fleurieu Community Foundation are never spent - only the interest generated from those funds is distributed. The Foundation supports charitable projects of public benefit to Fleurieu communities that:

Aim of the Grant Program

The Fleurieu Community Foundation Grant Program – Building Community Wellbeing, gives grants for charitable purposes in the Fleurieu region with a focus on community health and wellbeing, community development, education, environmental and cultural projects. In this grant round priority will be given to projects that support the following areas of focus:

- **People with a Disability** – to develop resourcefulness, living skills and confidence that facilitate self reliance and participation in the community.
- **Mental Health** – programs and initiatives that support positive mental health and wellbeing for people of any age.
- **Fostering Youth Leadership** – programs and initiatives that foster leadership by young men and women (aged 13 to 25)

For this grant round a total amount of \$1,000 has been allocated.

What can be funded?

The Fleurieu Community Foundation is endorsed by the Australian Taxation Office as a Tax Concession Charity and therefore required to fund projects that are charitable in nature. The legal meaning of charitable purposes includes:

- Relieving poverty, sickness or the needs of the aged
- Advancing education
- Advancing religion
- Other purposes beneficial to the community

Some common examples of charitable purposes include projects or programs such as:

- Addressing the needs of the aged.
- Animal protection societies, animal refuges and shelters.
- Promoting arts and culture.
- Addressing the needs of victims of natural disaster or catastrophe.
- Advancing education and research, historical education societies, Scouts and Guides, health education groups, preschools, non-government schools, colleges and universities, industry training organisations.
- Protecting, preserving and caring for the environment and education about the environment.
- Groups for people with particular illnesses or diseases, hospitals and ambulance services.
- Addressing the needs of indigenous people including health and welfare, legal, housing and youth services.
- Advancing industry, commerce and agriculture including show societies, agricultural research and apprenticeship and traineeship organisations.
- Neighbourhood Centres and community service organisations.
- Support groups for people with a disability and disability employment services.
- Addressing the needs arising from poverty and unemployment, including accommodation for people experiencing homelessness, training services for people who are unemployed, and soup kitchens.
- Religious education bodies and maintaining religious buildings.
- Advancing scientific research.

For more information on charities and charitable purposes, go to the Australian Charities and Not-for-profits Commission website www.acnc.gov.au or contact the Foundation's Executive Officer.

In addition to being for charitable purposes, applications should preferably have the following characteristics:

- Demonstrate that a grant is necessary for the project to be able to proceed.
- Addressing identified areas of need within the community.
- Have long term benefits for the community.
- Are innovative.
- Have a realistic chance of success.
- Encourage community participation.
- Help find solutions to community problems.
- Demonstrate cooperation with other organisations.
- Where possible include a financial and or in-kind contribution.
- Clearly define a plan and budget.

What cannot be funded?

- Projects which are not considered to be for "charitable purposes".
- Operational and administrative costs.
- Government departments and organisations are not considered charitable by the Australian Taxation Office. Applications from government departments and organisations need to demonstrate that they are not seeking funding for activities, which are the core responsibility of Government. Applications need to demonstrate that the activity is in addition to its core purpose.
- Projects that give donations to other organisations.
- Projects for which there is a more appropriate funding source.
- Projects which duplicate an existing program or service.
- Applications from individuals.

- Fundraising purposes.
- Reimbursement of money already spent.
- Projects that have already occurred or will occur before being advised of the outcome of the application.

Who is eligible for funding?

The Community Wellbeing program gives grants to charitable organisations. To be a charity an organisation must be not-for-profit, have a charitable purpose, and be for public benefit. Organisations need to operate in one or all of the following local government areas:

- Alexandrina Council
- City of Victor Harbor
- District Council of Yankalilla

Organisations based within these local government areas will be given priority. Organisations outside these areas are eligible to apply but must be able to demonstrate that the project will primarily impact upon residents in these local government areas.

Points to note

If the requested grant represents only part of the total funding required for the project, details of how the balance is to be realised must be provided. The balance could include fundraising, other grants, donations, and existing funds, volunteer or in-kind support.

It is expected that projects would normally be completed within twelve months of funding being received.

Successful applicants will be required to sign a Grant Agreement. Appropriate acknowledgement of the support of the Fleurieu Community Foundation should be given in promotional materials and reports. At the end of the project a brief report and expenditure statement must be provided.

Application Procedure

Grant making rounds are publicly announced through the Foundation's newsletter, on our website or via media release in local media outlets. The targeted area of interest may change from funding round to funding round.

Applications must be on the Community Wellbeing Grant Application Form. It is essential that applicants read the Grant Making Guidelines prior to filling in the Grant Application Form. It is highly recommended that applicants discuss their project idea with the Foundation's Executive Officer prior to preparing an application for funding.

The Grant Application form can be obtained by contacting the Fleurieu Community Foundation by phone on 08 85522411, through their website www.fleurieucommunityfoundation.org.au or by emailing info@fleurieucommunityfoundation.org.au

Grant applications may be lodged by mail or email and must be received or postmarked no later than the closing date. The completed Application together with essential additional information and supporting documentation should be sent to:

Fleurieu Community Foundation Ltd
PO Box 246
Victor Harbor SA 5211

info@fleurieucommunityfoundation.org.au

Application Assessment Process

All applications will be assessed on merit, based largely on the written information provided and will consider the following:

- If the application meets the eligibility criteria.
- Evidence of need for the project.
- Extent of benefit or outcomes.
- Cost effectiveness.
- Links to the community.
- Involvement and support from the community and evidence of community engagement
- The organisation's capacity to deliver the project.
- Equitable distribution. The Fleurieu Community Foundation aims to provide equitable funding allocations across the Fleurieu region.
- The number and range of applications received and funds available to distribute.

To ensure that informed decisions are made, on occasions, applicants may be requested to provide further information.

The Board of Directors Grant Making Sub Committee will evaluate the Grant Applications and make recommendations to the Board. The Board of Directors has the final approval for the distribution of grants.

Timing of decisions will be dependent on Board meetings. Applicants will be notified in writing of the outcome of their application.

The Foundation will publicly inform the community about grant making decisions on it's our website, in newsletters, and via media releases.

Grant Application Form - Building Community Wellbeing

The Organisation

1. Name of organisation	
2. Organisation ABN	
3. Contact person	Name: Telephone: Mobile Telephone: Email:
4. Postal address of the organisation	
5. Web address of the organisation (if applicable)	
6. Is your organisation registered for GST?	Yes / No
7. Does your organisation have Deductible Gift Recipient Status (DGR)?	Yes / No If you are successful you will be asked to provide evidence of this status.
8. Is your organisation a Tax Concession Charity (TCC)	Yes / No If you are successful you will be asked to provide evidence of this status.
9. Is your group incorporated?	Yes / No
10. When was your group established?	
11. What does your organisation do? (Provide a brief overview focusing on the activities and programs you deliver)	

The Project

12.	Project title (This will be the name used to refer to the project in future correspondence)
13.	Project start date: Project end date:
14.	Amount requested: Total project cost:
15.	Project summary (please provide a brief summary of the project)
16.	Project description i.e. <u>what</u> do you want to do and <u>why</u> you want to do it. <u>Where</u> will the project take place and <u>who</u> will benefit. Indicate <u>when</u> you expect the project to be completed and <u>how</u> you will evaluate the project.

17.	Please describe how your project is charitable (see Grant Guidelines) and how it addresses the focus area.
18.	Who has been consulted in development of this project?
19.	Who supports the proposal? (letters can be attached)

Proposed Financial Budget

Project Budget

Outline your project budget including details of other funding that has been confirmed and applied for. The budget must balance (total income = total expenditure).

INCOME	\$
Amount requested in this application	
<u>Other funding sources</u> Applicant (indicate your contribution to the project) Other sources of funding for this project (Please indicate whether or not this funding has been secured) • • •	
In-kind contributions (include an estimated value for non-cash contributions such as services, equipment, time and materials) ▪ ▪ ▪	
TOTAL INCOME	
EXPENDITURE (Breakdown itemized details)	\$
TOTAL EXPENDITURE (Should equal Total Income)	

Attachments

Please attach one copy of the following:

- Latest audited annual financial statement
- Any other information to support your project

Organisation Declaration

To be signed by the Chair or Chief Executive of the organisation and one other authorised person.

- I declare that I am currently authorised to sign legal documents on behalf of the organization.
- I declare that all the information provided in this application is true and correct.
- I understand that if the Fleurieu Community Foundation approves a grant, I will be required to accept the conditions of the grant as outlined in the Fleurieu Community Foundation General Grant Conditions.
- I give permission to the Fleurieu Community Foundation to contact any persons or organisation in the assessment of the application and understand that information may be provided to other organisations, as appropriate.

Signature _____ Date _____

Name _____

Position _____

Signature _____ Date _____

Name _____

Position _____

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PO Box 246
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'BUILDING COMMUNITY WELLBEING'

Grant Assessment and Acquittal Form

The Grant Assessment Report needs to be completed and returned to the Fleurieu Community Foundation within 4 weeks of the completion of your project. Failure to do so may jeopardize future funding applications.

Name of Organisation: _____

Project Title: _____

Grant amount received from Fleurieu Community Foundation Ltd: \$ _____

ORGANISATION/GROUP CONTACT DETAILS:

Contact Name: _____

Telephone: _____ Mobile: _____

Postal Address: _____

Email: _____

PROJECT OUTCOMES:

Please provide a statement about the project and the outcomes achieved. (Please include any photos or relevant reports)

PROJECT EXPENDITURE:

PROJECT INCOME (CASH)	\$
Grant received from the Fleurieu Community Foundation	
<u>Other funding sources</u> Applicant (indicate your contribution to the project) Other sources of funding for this project • • •	
TOTAL INCOME	
PROJECT EXPENDITURE (CASH) (List cash expenditure below)	\$
TOTAL EXPENDITURE (Should equal Total Income)	

DECLARATION:

Signature of 2 office bearers of the organisation or group that received the Grant

Declaration: We hereby certify that the one-off funding approved under the Fleurieu Community Foundation Community Grants Program has been expended for the approved purposes as specified and certify that this report is a true and correct record and all grant monies have been acquitted.

Name: _____

Name: _____

Signature: _____

Signature: _____

Position: _____

Position: _____

Date: _____

Date: _____

Please return to Fleurieu Community Foundation, PO Box 246, Victor Harbor SA 5211 or email info@fleurieucommunityfoundation.org.au