

# The Blum Foundation Gifts Application Guidelines

**ANZ Executors & Trustee Company Limited ABN 33 006 132 332**

These Guidelines have been prepared and are published by the Polish Community Council of Australia and the Sister Superior of the Sisters of the Resurrection, Essendon, to assist organisations wishing to submit an application to The Blum Foundation. Guidance and advice is provided by ANZ Executors & Trustee Company Ltd, the trustee of The Blum Foundation.

## **1. INTRODUCTION**

The Blum Foundation was established in accordance with the Will of the late Stanislaw Blum, a Polish migrant, who throughout his life upheld the values of generosity, benevolence and charity. In a quiet and humble manner, he regularly assisted a broad range of non-profit organisations and charities. However, what was close to his heart was the maintenance of Polish culture and language with future generations in Australia.

This has been demonstrated by The Blum Foundation which is dedicated to the promotion and encouragement of education of the Polish language and culture in Australia.

Stanislaw Blum arrived in Australia in 1949 - a qualified civil engineer from Poland, who spent the duration of the Second World War as a prisoner-of-war. The post-war years were spent working for the US Army rebuilding war-torn Germany. Like many other migrants to Australia, he was committed to a two year work contract. In his case his first two years as a migrant were spent in Whyalla in South Australia.

His first contact with organised Polish community life was in Melbourne, where he was the co-founder and first president of the Polish Technical Club. Opportunities of employment led him to Eildon and eventually Cooma, where he was to spend the last 25 years of his working life. It was there that his pre-war qualifications were recognised and he was employed as an engineer.

He lived quietly and frugally in a workers' hostel with few personal possessions. Apart from his books and personal mementos, he treasured his late 1950s Holden, which he purchased brand new and drove until he passed away.

With retirement, Stanislaw purchased a home in Boronia, in the foothills of the Dandenong Ranges in Victoria. It was his first and only home in Australia. He died in 1998, at the age of 90, never having been married or having children.

It was only with his death, that the level of his generosity was revealed. Through hard work, he acquired properties and investments, which eventually became the basis for The Blum Foundation. The value, which Stanislaw Blum exemplifies, is the generosity of the human heart. He lived with the belief that the average person can assist and make a difference in every small way. Though without a wife and children of his own, he felt that he was part of a larger family - that of the Polish Australian community - which has become one of his beneficiaries.

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The Blum Foundation is administered by ANZ Executors and Trustee Company Ltd (Trustees) and gifts from the Foundation are decided by the trustee following advice from an advisory committee, constituted in accordance with the Will of Stanislaw Blum. The advisory committee is made up of the Sister Superior of the Sisters of the Resurrection and her representatives, as well as community representatives nominated by the Polish Community Council of Australia.

Applications for gifts from The Blum Foundation will be invited once a year. However in exceptional situations gifts may be made outside the standard application process.

## **2. WHO IS ELIGIBLE TO APPLY?**

### **Organisations applying for gifts must:**

- be non-profit and non-political;
- keep proper accounting records and have, at least, yearly financial statement or reports;
- provide information about ABN, tax status and GST registration; and
- provide a signed application form and signed privacy statement and consents form

### **They must also either:**

- serve the needs of the Polish Community of Australia; and/or
- promote and encourage the education of the Polish language and culture in Australia.

## **3. WHAT IS EXCLUDED FROM THE BLUM FOUNDATION GIFTS?**

### **Gifts will not be given to:**

- organisations that fail to submit required documents or information requested by The Blum Foundation;
- organisations that have failed to carry out or complete any previous projects funded by The Blum Foundation;
- organisations that fail to co-operate with The Blum Foundation requirements;
- other Foundations which are themselves grant making bodies;
- individuals;
- political organisations;
- private profit-making organisations; or
- employer and employee associations or organisations.

### **Gifts will not be given for:**

- political activities;
- payment of debts or mortgages;
- capital expenditure such as land purchase, erection of building, or building renovation; or
- commercial or business ventures.

#### 4. HOW TO APPLY FOR A GIFT

Funding guidelines and application forms can be obtained by telephoning ANZ Trustees' Philanthropy Partners on FREECALL™ 1800 808 910, or on the website:  
<http://www.anz.com/aus/fin/Trustees/guNamed.asp#Blum>

Applications must be made on the official forms.

It is essential that any change of office bearers, telephone numbers and postal address be notified immediately.

The closing date for all applications is **1 October each year**.

#### 5. NOTIFICATION

The announcement of successful applications is expected to be made in November. Successful applicants will be notified in writing of the result of their application. Typically grants totalling \$30,000 to \$35,000 are distributed each year.

#### 6. FUNDING CATEGORIES

##### **Gifts for organisational support - What is organisational support for gift purposes?**

This category of gift provides financial assistance up to \$1,000 towards the general activities and needs of an organisation, including after hours ethnic schools. The gifts are for the support and development of the activities of the organisation.

##### **Standard conditions for receiving a gift**

- a) the organisation receiving the gift will use the whole of the gift exclusively for the applied activity and not for any other purpose
- b) the organisation receiving the gift will use its best endeavour to complete the activity within twelve months from the date of the gift
- c) the organisation will promptly advise The Blum Foundation of any material change that may affect its ability to undertake or complete the activity within twelve months from the date of the gift
- d) if for any reason the organisation is unable to undertake the activity or complete it, or the gift is not fully expended on completion of the activity, the organisation will promptly repay the whole of the unexpended part of the gift (as the case may be) to The Blum Foundation
- e) the organisation will expend the gift only within Australia
- f) the organisation will show the gift separately in its books of account and keep records adequate to enable the use of gifted funds to be checked readily
- g) the organisation will acknowledge the gift from The Blum Foundation in any published or display material or by such other means as The Blum Foundation may request
- h) the organisation will give The Blum Foundation a final report at the end of the twelve months from the date of the gift or within two months of completion of the activity (whichever is the earlier)

## **Gifts for special projects - What is a special project for gift purposes?**

Gifts of up to \$5,000 may be made to organisations which wish to undertake special projects designed to meet the cultural and linguistic maintenance needs of the Polish community in Australia or the promotion and encouragement of education of Polish culture and language more broadly in Australia.

Special projects are expected to be both new and innovative over and above day to day activities of an organisation. Gifts are less likely to be made for the continuation of existing projects. Preference will be given to projects which benefit the broader Polish community in Australia and which target a cross section of the Polish Australian community and are carried out on a co-operative basis.

Projects will need to be completed within a twelve month period and become self-supporting thereafter. There must be a clear outcome or set of outcomes from the proposed project.

However, with exceptional projects where outcomes can be only achieved over a longer period, a gift extending over a two-year period may be made.

### **Assessment of applications**

Listed below are a number of important points, which will be taken into consideration when applications are being assessed.

#### **The Organisation**

- the aims, objectives and priorities of your organisation
- the size of the community served by your organisation
- the capacity of your organisation to manage and evaluate the project and account for the expenditure of the gift monies
- other resources available to your organisation
- the level of financial assistance received from other sources

#### **The Project**

- the availability of other, more appropriate sources of funding for the project
- the possibility that the project may be duplicating existing services/projects/applications
- the potential benefit to be derived from the project (ie. what needs it is designed to meet, how large a community is to be served)
- for projects which are expected to continue beyond the twelve month gift period - the availability of ongoing funding from other sources/capacity of the project to become self-supporting or a time frame showing the expected finish date and stages of the project
- the viability of the project

## **CONTACT DETAILS**

Applications should be sent to the office of ANZ Trustees' Philanthropy Partners.

The Blum Foundation  
ANZ Trustees' Philanthropy Partners  
GPO Box 389D,  
Melbourne Victoria 3001



## Grant Application – Cover Sheet

**YOU MUST PROVIDE SIX COPIES OF THE FULL APPLICATION AND ONE COMPLETED COPY OF THE PRIVACY STATEMENT AND CONSENT.**

### The Blum Foundation - Project Gift

<b>Your organisation's name:</b>	
<b>Your organisation's postal address:</b>	.....
<b>Your organisation's street address:</b>	.....
<b>Organisation's telephone number:</b>	.....
<b>Organisation's facsimile number:</b>	.....
<b>Contact person's details [a] name:</b>	.....
<b>[b] telephone number:</b>	.....
<b>[c] email address:</b>	.....
<b>Organisation's ABN number and tax status:</b>	<b>ABN number:</b>

You must show that the Australian Tax Office has endorsed your organisation's tax status with effect from 1 July 2000 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.

<b>GST:</b> Have you registered for the GST?	<b>Please tick appropriate answer: YES [ ] NO [ ]</b>
<b>Name</b> of the project for which you are seeking a grant:	.....
<b>Description</b> of project:	.....
<b>Amount (\$)</b> of grant being requested:	\$ .....
<b>Total</b> budget for the project or activity:	\$ .....
<b>Total</b> budget for your organisation (for the current year):	(specify contribution from your organisation) .....

**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. I have read the terms and conditions relating to the application for a grant from ANZ Trustees Programs, including the Privacy Statement and Consent to use of personal information, and agree to those terms and conditions.

<b>Applicant's signature:</b>	
<b>Date signed:</b>	

## The Blum Foundation: Project Gift Application Form

This application form has been prepared and published by the Polish Community Council of Australia and the Sister Superior of the Sisters of the Resurrection, Essendon, to assist organisations submitting an application to The Blum Foundation.

Applicants must read *The Blum Foundation Gifts Application Guidelines* before completing this application form. This form should be completed accurately and as fully as possible. If there is insufficient space on this form for your response, please attach extra information to this application.

If your organisation is **incorporated**, please attach the following documents to this application form:

- a copy of your organisation's certificate of incorporation, and statement of aims and objectives; and
- a copy of your organisation's latest financial statement, clearly showing all income, expenditure and balance of accounts for the preceding twelve months. The statement should be signed by the Treasurer of your organisation.

If your organisation is not incorporated but **is associated with or part of another incorporated organisation**, you will need to attach the following documents:

- a copy of that organisation's certificate of incorporation; and
- a copy of that organisation's most recent audited financial statement.

Six copies of this application form and the required documents, should be posted to:

The Blum Foundation  
ANZ Trustees' Philanthropy Partners  
GPO Box 389D, Melbourne 3001.

If you require any assistance, please contact Ms Marzenna Piskozub on (03) 9337 5056 or Ms Stasia Jaskula on (03) 9457 2362.

### DETAILS OF PERSON COMPLETING THIS APPLICATION FORM

Name: \_\_\_\_\_

Organisation: \_\_\_\_\_

Position: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Project name: \_\_\_\_\_

**PART ONE – ORGANISATION DETAILS**

1. Name of applicant organisation:

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2. If your organisation is or has been known by any other name, please print the name(s) below:

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3. Name of associated organisation (if applicable):

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4. Address of applicant organisation/address of meeting place:

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5. Postal address for correspondence if other than above:

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6. ABN, tax status and GST:

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**ABN number:**

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**Tax status:** You must provide documents which show that the Tax Office has, **before, 1 July 2000**, endorsed your organisation's tax status – 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 GST?

**Please tick** appropriate answer:    **YES**        **NO**

7. Please list two people who can be contacted about this application

*Primary contact*

Name: \_\_\_\_\_

Position held: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email address: \_\_\_\_\_









13. Who will benefit from your proposed project (i.e. your target group)?

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14. What outcomes will be achieved through the project?

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15. Why have you chosen this project?

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21. Please provide the names of two community leaders or organisations who may act as referees for your application.

Referee 1

Name: \_\_\_\_\_

Position held: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email address: \_\_\_\_\_

Referee 2

Name: \_\_\_\_\_

Position held: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email address: \_\_\_\_\_

**PART THREE - DECLARATION**

*(To be signed by two members of the executive committee which must include the chairperson/president and either the secretary or treasurer of the applicant organisation. In the case of an unincorporated organisation, the form must be signed by the chairperson of the applicant organisation and the chairperson of the associated organisation).*

We, the undersigned, on behalf of the applicant organisation, certify that the information set out and attached to this application is correct.

We agree that the gift will be expended on the project and for no other purposes and that we may, at the discretion of The Blum Foundation, be required to return on written request any part of the gift which has not been expended in accordance with this condition. The Blum Foundation also reserves the right to refer any evidence of misappropriation of the gift to relevant authorities for investigation.

We agree to retain the original receipts of expenditure on the project for 12 months from the date of receipt of the gift and to make the receipts available to The Blum Foundation on request during the period of the funded activity.

Signed : \_\_\_\_\_

Name: \_\_\_\_\_

Date: \_\_\_\_\_

**Chairperson/President of applicant organisation**

Signed : \_\_\_\_\_

Name: \_\_\_\_\_

Date: \_\_\_\_\_

**Treasurer of applicant organisation or Chairperson of associated organisation**

# PRIVACY STATEMENT AND CONSENTS

This statement applies to ANZ Executors and Trustee Company Limited ABN 33 006 132 332 (**ANZ Trustees**), trustee of The Blum Foundation (**Trust**) to which your grant application relates and advisors appointed by the Trustee or otherwise under the terms of the Trust to advise or assist the Trustee in considering your grant application.

## Collection of personal information

In its application to ANZ Trustees for a grant, your Organisation (the Applicant) gives ANZ Trustees contact details and other personal information about directors and other key personnel (Individuals). In the future ANZ Trustees, 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.

## 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 Trustee 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:

Philanthropy Partners  
ANZ Executors & Trustee Company Limited  
GPO Box 389D, Melbourne, 3001  
FREECALL™: 1800 808 910  
Fax: 03 9273 6354

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