



GRANT GUIDELINES FOR ANZ TRUSTEES PROGRAMS

WEBSITE: <http://www.anz.com/aus/fin/Trustees/>

These programs and guidelines resulted from a review of the grantmaking policy of ANZ Trustees conducted in 2003.

ANZ Trustees' grantmaking vision acknowledges the duty and absolute obligation to the trust instrument and the benefactors, and positions ANZ Trustees as striving, where it has been entrusted to exercise judgment in grantmaking, to have a sustained positive impact on community outcomes.

The hallmarks of the grantmaking vision are:

- ⇒ Identifying leaders and visionary not-for-profit organisations as partners;
- ⇒ Addressing causes rather than symptoms;
- ⇒ Creating leverage;
- ⇒ Paying attention to sustainability; and
- ⇒ Supporting organisational development.

In a range of ways ANZ Trustees seeks to leave the funded organisations and communities stronger than we found them.

You can read more about ANZ Trustees policy of creative grantmaking by following the links on the website. To assist you to understand what the trustees are looking for in a project, the diagram on the page following provides a visual representation. The horizontal axis represents a time horizon.

Our policy outlines the three key elements to creativity in grantmaking:

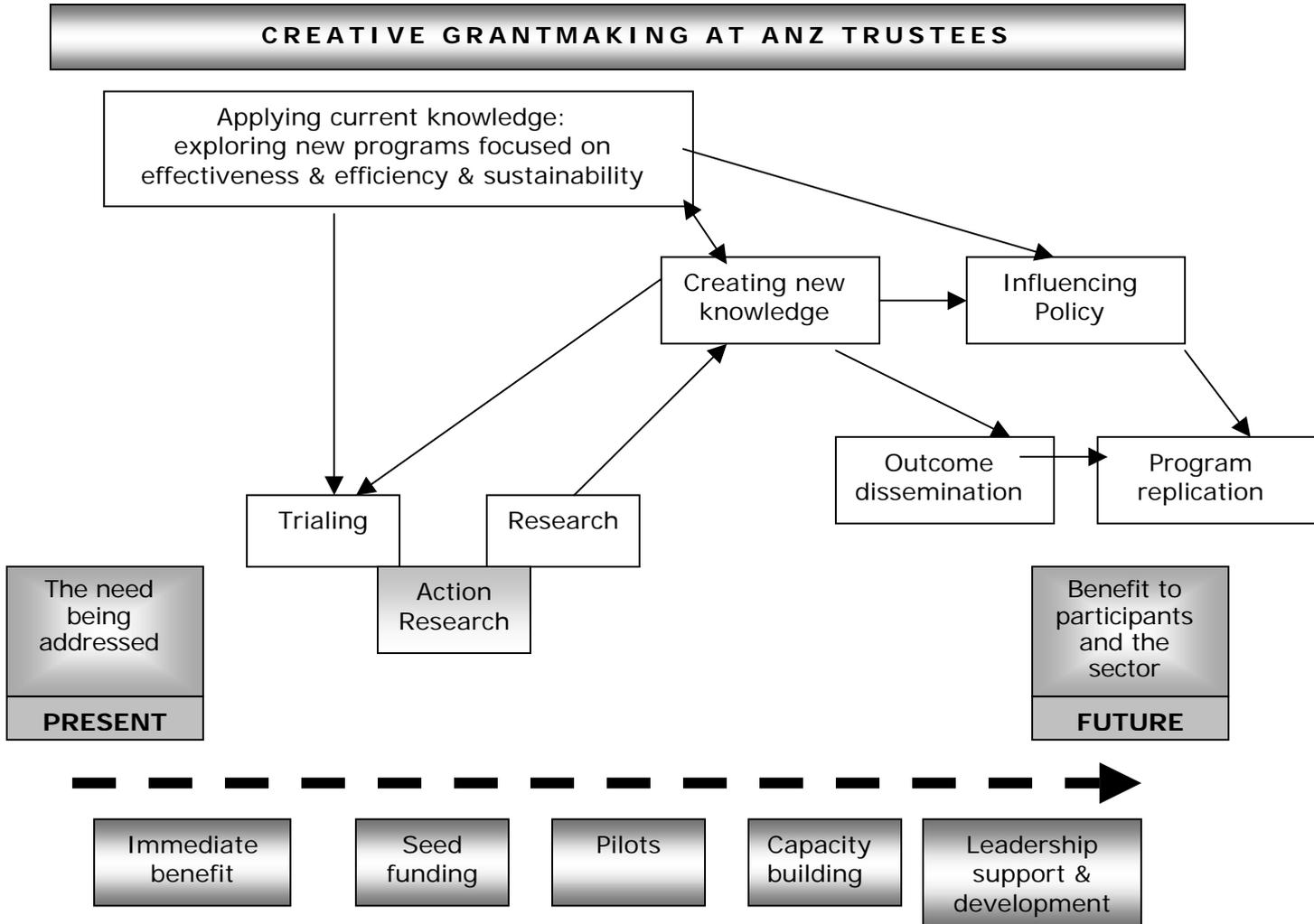
1. The ability to identify learning organisations;
2. The acknowledgement of the need for, and the allocation of funding for, an independent verification of the innovation;
3. Working within and towards an enabling environment of influence.

ANZ Trustees can never be, and does not seek to be, a substitute for securing ongoing government funding. Nor is it a supplementary funding source for shortfalls or deficits in government funded programs. The avoidance of creation of dependence on philanthropic funding, which is *non-recurrent* funding, is a key consideration in our grantmaking. As well, we are acutely aware that the pressure to continually innovate can debilitate an organisation.

In undertaking granting decisions from the trusts ANZ Trustees serves, there is a conscious and deliberate effort to identify the charitable needs of the community, not just the publicly or government identified ones. Generally overlooked issues and needs also receive attention and consideration.

Overall, a variety of grants and a range of organisations, with varied project designs and degrees of success in present and future spheres will constitute the portfolio of ANZ Trustees' funded projects, and we acknowledge that one of the duties of administering perpetual trusts is to be mindful of the future.

GRANTMAKING AT ANZ TRUSTEES



Examples of projects funded by ANZ Trustees

- An organisation that assists people with disabilities devised a business plan for a venture that would use community support (funding and in-kind) to establish a small business, eventually self-funding, designed to provide employment for the clients of the organisation. The organisation applied for funding for the capital development part of the project, providing staffing from within its own budget.
- An organisation that assists families ran a successful government funded project focused on children, but wished to extend the age range of those receiving support. The organisation applied for funding to trial the extension in order to collect data that would influence government to extend the funding currently provided.
- A self-help group for families whose members suffer from a particular disorder found that demands on the assistance they were providing were great enough to require a staff member to be appointed. This service was not duplicated by any other accessible service. The group already had the required taxation status, and so applied for seed funding to make the appointment, with a view to seeking donations and some fee for service, and developing community support over a three-year period.
- An organisation committed to research in a particular area of aged care wished to partner with a consortium of service providers in order that results of the research could be embedded in the practice of these organisations. Funding was received to coordinate and manage the project and to provide some assistance and support to the participating organisations to carry out the modifications to care.



ANZ Executors & Trustee Company Limited
ABN 33 006 132 332

Philanthropy Partners, ANZ Trustees

GRANT GUIDELINES FOR ANZ TRUSTEES PROGRAMS

WEBSITE: <http://www.anz.com/aus/fin/Trustees/>

Information for organisations seeking a grant from charitable trusts administered by ANZ Executors & Trustee Company Limited ("ANZ Trustees", ABN 33 006 132 332), a statutory trustee company operating in the mainland states and territories of Australia. ANZ Trustees is sole trustee or co-trustee of around 400 charitable trusts, settlements and foundations.

The ANZ Trustees Programs groups trusts with the same or similar purpose in order to:

- ◆ Increase the impact on the particular charitable areas nominated by the benefactors.
- ◆ Provide sufficient funds to support initiatives likely to achieve sustainable benefit to the community.

Note: These *Grant Guidelines for ANZ Trustees Programs*, and closing dates are subject to change. Before lodging an application it is the responsibility of the applicant to access the website to make sure guidelines, programs and closing dates are current. Applications not based on current guidelines and programs will not be accepted. Applications not providing all requested information will be returned and you may revise and re-submit applications for the next closing date.

These *Grant Guidelines for ANZ Trustees Programs* cover applications to ANZ Trustees Programs (see full listing in the body of the guidelines). The following trusts, foundations and programs have separate guidelines and separate application processes (see website for a full listing):

1. ANZ Staff Foundation
2. Medical Research and Technology in Victoria Program
3. The Alfred Felton Bequest
4. The Sylvia and Charles Viertel Charitable Foundation
5. The William Buckland Foundation

It is recommended that you review all the *Grant Guidelines* before you decide where best to apply.

Applying for a grant from ANZ Trustees Programs:

1. Read all material in these *Grant Guidelines for ANZ Trustees Programs*.
2. For a fuller understanding of requirements, you can read additional papers and background material provided on the website, including 'Creative Grantmaking at ANZ Trustees: A Discussion Paper', and our regular publication, 'Trustee Focus'.
3. Submit your application using the Grant Application Forms:
 - Application Details
 - Application Cover Sheet
 - Application Checklistand supply all the information requested, including signatures and dates, and copies of documentation showing your organisation's taxation status.
4. Complete a separate application for each project for which you are seeking a grant; and for each program or trust from which you are seeking a grant.
5. Provide the original and one copy of each separate application.
6. Do not include any materials other than those specifically requested.
7. Sign and date all forms.
8. Review the checklist and enclose a copy with your application
9. Post or deliver the application to Philanthropy Partners, ANZ Trustees. Email submissions will not be accepted.

Closing dates for applications:

Closing times are 5pm on the date stated in the relevant section of the guidelines. Late applications will not be accepted. Trustee meetings are usually held within eight (8) weeks of the closing date of applications. If the closing date falls on a weekend, you may submit until 5pm on the following business day.

Lodgement of applications:

Postal address

Philanthropy Partners, ANZ Trustees
PO Box 389D Melbourne Vic 3001

Delivery address

Philanthropy Partners, ANZ Trustees
4/100 Queen Street Melbourne Vic 3000

Telephone: FREECALL™ 1800 808 910 **Facsimile:** (03) 9273 6354

FREECALL™ is a trademark of Telstra Corporation Limited ABN 33 051 775 556

Summary: Grant Guidelines for ANZ Trustees Programs

ANZ Trustees Program	Summarised purpose & restrictions [check full guidelines]	Size of grants (approx)	Trusts & Foundations	Closing date
National Charitable Initiative	Organisations that have a strategic national mission are eligible. Only one grant per annum is made.	\$12,000 - \$20,000	Robert Colin Ford Estate	1 Mar
Charitable Purposes in Victoria	Projects that enhance the community and provide support to the vulnerable and disadvantaged. Preference to projects that seek new, sustainable solutions to identified problems	\$5,000 - \$25,000	Harry Dicker Estate; Alfred Edments Estate; Charles Lamond Forrest Estate; Rena Vesey Hall Estate; James R.Hartley Estate; Louisa M Henty Estate; Harold Moreham Oldham Perpetual Trust; Otto & Elizabeth Schumacher Trust; Charles and Jessie Strong Trust; Charles Frederick William Taylor Trust; Miss Ruth Watchorn Estate; W E L Wears Estate; Victorian Community Foundation - General Fund; VCF – ANZ Fund; VCF La Vette Bequest; VCF Claire Susan Gardiner Trust; VCF A E McKay Trust, VCF George Perry Fund	1 Mar & 1 Sept
Charitable Purposes in Regional Victoria	For charitable purposes in Victoria where: 1. Applicant organisations must operate projects in and around the Goulburn Valley, in particular: Junior Legacy; hospitals, accommodation that benefits older people; charities supporting the community; or 2. Preferred applicant organisations will have a current connection with the Barwon Heads and Ocean Grove area	\$5,000 - \$10,000	The McEwen Foundation; A G Johnston & I D Johnston Perpetual Trust	1 Sept
Charitable Purposes in Tasmania	For charitable purposes in and around Hobart, Tasmania	\$10,000 - \$15,000	Dr R A Parker Estate; Dr R A Parker Settlement	1 Sept
Strategic Impact in Victoria	Selected projects that strategically address a community issue of concern. Significant funding for two years or more is given and generally no more than one grant per annum is made.	\$400,000 (over 2 years)	Ella & Mitchell Brazier Fund Leigh & Marjorie Bronwyn Murray Charitable Trust; Theodatus John Sumner Estate; Ernest Truby & Florence Williams Estate; Thomas George & Lockyer Potter Charitable Trust; Others from time to time at the discretion of the Trustees.	By invitation
Young Indigenous People in Victoria	For the advancement of young indigenous people in Victoria.	\$2,000 – \$12,000	VCF Sir John Minogue Bequest	1 Sept
ANZ Charitable Trust Australia Support Fund for Physically Disabled Adults	Strategic projects that support disabled adults in the community	\$see guidelines	ANZ Charitable Trust Australia Victorian Disabled Citizens Association (this is a non-perpetual trust which will conclude in 2007) (Separate guidelines available)	1 April 2005
Community Inclusion for the Disabled in Victoria	Supporting the inclusion and engagement in our community of children and adults with disabilities.	\$2,000 - \$30,000	John Saville Eastwood Estate; Percy & Ruby Haddy Foundation	1 Mar & 1 Sept
Accommodation and Care of Older People in Victoria	Assistance with building & refurbishment costs; and other initiatives to help the aged	\$2,000 – \$10,000	John Saville Eastwood Estate; Selwyn Henry Langston Estate	1 Mar & 1 Sept

	disadvantaged achieve a better quality of life.			
Health and Well Being of Older People in Victoria (CURRENTLY NOT ACCEPTING APPLICATIONS)	The promotion and maintenance of health and well being of Victorians with a focus on healthy ageing, including research into and prevention and treatment of cancer and heart disease. Quality of life outcomes for older Victorians based on better health provision are sought.	\$5,000 - \$30,000	VCF James and Vera Lawson Trust; VCF Dean Robert Winter Trust; VCF Sir John Minogue Bequest	1 Sept
Disaster Relief in Victoria	For relief of a crisis or disaster On submission of a letter of inquiry, or on determination by the Trustee at least annually	\$2,000 - \$5,000	Helen Gyles Turner Samaritan Fund	open
Medical Research in NSW	To conduct research for the purpose of and into a cure for cancer	\$25,000	NSW Community Foundation Nicholas and Phyllis Pinter NSW Community Foundation General Fund	By invitation

In general, **unless an exception is specified under the specific guidelines**, the trusts and programs will not fund any of the following:

<ul style="list-style-type: none"> ➤ budget deficits; ➤ general operating expenses; ➤ general fund raising campaigns ➤ annual appeals; ➤ core programs funded from other sources; ➤ conferences and other professional development activities; 	<ul style="list-style-type: none"> ➤ building costs; ➤ equipment, unless it is an integral part of an eligible project, or a very special need can be demonstrated; ➤ transport or the purchase of vehicles; 	<ul style="list-style-type: none"> ➤ bodies which are themselves grant-making agencies; ➤ bequest programs; ➤ contribution to the corpus of another trust ➤ sectarian or religious bodies where services are limited to their own members; ➤ individuals.
--	---	--

OTHER				
ANZ Trustees Children's Medical Research in Queensland	Refer to the website for separate guidelines and information on trusts that fund this program.	tba	ANZ QCF the Katherine Hannay Estate; ANZ QCF T G Swallow Trust; ANZ QCF Bank Fund; ANZ QCF (General Fund)	1 Mar
ANZ Trustees Medical Research in Queensland	Refer to the website for separate guidelines and information on trusts that fund this program.	tba	Herbert John Hinchey Charitable Trust; Kenneth Cameron Thomson & Betty Madge Thomson Memorial Fund; A E Hingeley Trust; R D Hingeley Trust; Laurie Gertrude McCallum Estate	1 Mar
Medical Research & Technology in Victoria	Refer to the website for separate guidelines and information on trusts that fund this program.	\$5,000 - \$25,000	Refer to website. This program is funded by a consortium of trusts: The William Buckland foundation; The Felton Bequest; The H D T Williamson Foundation; The Appel Family Bequest; The Arthur & Mary Osborn Estate.	30 June
ANZ Trustees Seeing Eye Dogs & Vision Impairment in Queensland	Refer to the website for separate guidelines and information on trusts that fund this program.	\$5,000- \$10,000	ANZ Queensland Community Foundation Floroyal Seeing Eye Dogs Foundation; ANZ Queensland Community Foundation Amy Florence Theobald Memorial Fund; The Herbert John Hinchey Charitable Trust	1 Sept
ANZ Trustees Scholarship Programs	Refer to the website for a full listing of scholarships, fellowships and traineeships offered by trusts and foundations under the administration of ANZ Trustees	\$500 - \$35,000	See website	various

ANZ Trustees Program: National Charitable Initiative.
Closed to applications 2007

The Program provides seed funding for initiatives or organisations that aim:

- To assist a national strategic approach to an issue of need in the community.

Preferred initiatives will display the following characteristics:

- Defined timeliness, or 'ripeness' of conditions in the operating landscape of the project;
- New partnerships that wish to develop a new approach to difficult issues.
- Leverage potential, or clearly defined impact that extends beyond the target group;
- A contribution to knowledge and practice in the sector of operation.

The program will **not** give favourable consideration to initiatives that include:

- Expansion of a program or service within or between State or Territories;
- Generic fundraising applications for established programs, activities or services.

Size of grants (approx)	Closing date	Tax Requirements
\$12,000 - \$20,000	Closed	Income Tax Exempt Charity (ITEC)

ANZ Trustees Program: Charitable Purposes in Victoria

The Program aims:

- To support families with complex needs in the rearing and development of children;
- To build the capacity of community organisations to strengthen and support the family and community;
- To support community arts / cultural programs that enable disadvantaged families to engage with community and or services.

Preferred projects will display the following characteristics:

- Clearly defined need, suitability and timelines for the project;
- Clearly stated outputs and outcomes, including the measures that will assess whether these have been achieved;
- A governance design that is a direct reflection of the aims of the project;
- Development and building of existing organisational strength;
- A thoroughly considered and mapped sustainability proposal;
- Leverage potential, or impact that extends beyond the target group;
- A contribution to knowledge and practice in the sector of operation.

The program will **not** give favourable consideration to projects that include:

- On going core programs with funding shortfalls from government;
- Requests for contributions for the continuation of larger scale Medical Research Projects;
- Generic fundraising applications for established programs, activities or services.

Size of grants (approx)	Closing date	Tax Requirements
\$5,000 - \$25,000	1 March & 1 September	Income Tax Exempt Charity (ITEC) is required for all, and for the Victorian Community Foundation (VCF) Deductible Gift Recipient is required, ie. only to charitable organisations to which gifts are deductible under Sec 30-15 [formerly Sec 78(1)(a) and Sec 78(4)] of the Income Tax Act.

ANZ Trustees Program: Charitable Purposes in Regional Victoria
(Preference to two areas – see below)

The Program is for general charitable purposes in Victoria with preference given to the following:

1. Applicant organisations in and around the Goulburn Valley are preferred, in particular:
 - Junior Legacy
 - Hospitals
 - Charities that support the community
 - Accommodation that benefits older people

OR

2. Applicant organisations with a current connection with the Barwon Heads and Ocean Grove area. ie organisations based in the area or benefiting worthy organisations and persons in that area.

Preference will be given to applications that clearly identify the need being addressed; the benefits that are to be gained from the grant, and how the project will be sustained once original funds are expended. Each applicant organisation may seek a grant of up to \$10,000. Projects involving partnerships may exceed this amount.

Size of grants (approx)	Closing date	Tax Requirements
up to \$10,000	1 September	Income Tax Exempt Charity (ITEC) As well as Deductible Gift Recipient (DGR) for applications around Goulburn Valley: ie. only to charitable organisations to which gifts are deductible under Sec 30-15 [formerly Sec 78(1)(a) and Sec 78(4)] of the Income Tax Act.

ANZ Trustees Program: Charitable Purposes in Tasmania

The program funds projects for general charitable purposes in Hobart Tasmania with the following aim:

- To address an identified area of need in the community;

Preferred projects will display the following design:

- Pilots or trials that potentially offer a sustainable solution to a social problem;
- A thoroughly considered and mapped sustainability proposal;
- Stated outputs and outcomes and the measures that will assess whether these have been achieved;
- Suitable governance design that is a direct reflection of the aims of the project;
- Development or building on existing organisational strength;
- Inclusion of an evaluation of appropriate complexity and scope to the magnitude and design of the project;
- Defined timeliness of the project;
- Leverage potential, or clearly defined impact that extends beyond the target group;
- A contribution to knowledge and practice in the sector of operation.

Size of grants (approx)	Closing date	Tax Requirements
\$10,000-15,000	1 September	Income Tax Exempt Charity (ITEC).
Only one grant per annum will be made		

ANZ Trustees Program: Strategic Impact in Victoria

The Program supports pilots or trials, or provides seeding grants for 2-year projects in Victoria that aim to achieve considerable community benefit and have a strategic impact in a selected area of need.

Preferred projects display the following design:

- A thoroughly considered and mapped sustainability proposal;
- Stated outputs and outcomes and strategic impacts and the measures that will assess whether these have been achieved;
- Suitable governance design that is a direct reflection of the aims of the project;
- Inclusion of an evaluation of appropriate complexity and scope to the magnitude and design of the project;
- Defined timeliness, or 'ripeness' of conditions in the operating landscape of the project;
- Development or building on existing organisational strength
- Leverage potential, or clearly defined impact that extends beyond the target group;
- A contribution to knowledge and practice in the sector of operation.

Size of grants (approx)	Closing date	Tax Requirements
\$400,000	By invitation to selected organisations as determined by the Trustee from time to time	Income Tax Exempt Charity (ITEC)
No more than one grant per annum. Grant is paid over 2 years.		

ANZ Trustees Program: Young Indigenous People in Victoria

The program funds projects in Victoria with the following aims:

- Advancement of young indigenous people;
- Assistance to young indigenous people in accessing existing support services;
- Supporting young indigenous people with complex needs to achieve their potential;

Preferred projects will display the following design

- A sustainability proposal;
- Stated outputs, outcomes and impacts, and the measures that will assess whether these have been achieved;
- Suitable governance design that is a direct reflection of the aims of the project;
- Development or building on existing organisational strength
- Inclusion of an evaluation of appropriate complexity and scope to the magnitude and design of the project;
- Defined timeliness and need for the project;
- Leverage potential, or impact that extends beyond the target group;
- A contribution to knowledge and practice in the sector of operation.

Size of grants (approx)	Closing date	Tax Requirements
\$2,000-12,000	1 September	Income Tax Exempt Charity (ITEC) as well as Deductible Gift Recipient (DGR), ie. only to charitable organisations to which gifts are deductible under Sec 30-15 [formerly Sec 78(1)(a) and Sec 78(4)] of the Income Tax Act.

ANZ Trustees Program: Community Inclusion for the Disabled in Victoria

The Program funds projects in Victoria with the following aims:

- Enabling children with physical disabilities to gain access to mainstream community activities; and
- Providing access to work, education and mainstream community activities for people with physical, intellectual or psychiatric disabilities.

Preferred projects will display the following design:

- Pilots or trials that potentially offer a sustainable solution to an access issue;
- A thoroughly considered and mapped sustainability proposal;
- Stated outputs and outcomes and the measures that will assess whether these have been achieved;
- Inclusion of an evaluation of appropriate complexity and scope to the magnitude and design of the project;
- Clearly defined need and identified disadvantage;
- Leverage potential, or impact that extends beyond the target group;
- Development or building on existing organisational strength;
- A contribution to knowledge and practice in the sector of operation.

Size of grants (approx)	Closing dates	Tax Requirements
\$2,000 - 30,000	1 March & 1 September	Income Tax Exempt Charity (ITEC)

ANZ Trustees Program: Accommodation and Care for Older People in Victoria

The Program funds projects in Victoria with the following aims:

- Building & refurbishment costs; and costs of equipment associated with the provision of accommodation for older people;
- Assisting the aged disadvantaged to achieve a better quality of life;
- Preference will be given to projects in rural Victoria.

Preferred projects will display the following design:

- Capital works and refurbishment plans with community support of the planned developments;
- Development or building on existing organisational strength;
- Clearly defined need and identified disadvantage;
- Leverage potential;
- A contribution to knowledge and practice in the sector of operation.

Size of grants (approx)	Closing dates	Tax Requirements
\$2,000 - 10,000	1 March & 1 September	Income Tax Exempt Charity (ITEC)

ANZ Trustees Program: Health and Well Being of Older People in Victoria

(CURRENTLY NOT ACCEPTING APPLICATIONS)

The Program funds projects with the following aims:

- The promotion or maintenance of the health and well-being of Victorians, with a particular focus on healthy ageing, including research into and prevention and treatment of cancer and heart disease;
- Quality of life based on better health outcomes for older Victorians

Preferred projects will display the following design:

- Projects that potentially offer a sustainable solution to a health issue;
- A design for long term benefits;
- A thoroughly considered and mapped sustainability proposal;
- Stated outputs and outcomes and the measures that will assess whether these have been achieved;
- Development or building on existing organisational strength;
- Defined timeliness of the project;
- Leverage potential;
- A contribution to knowledge and practice in the sector of operation.

Size of grants (approx)	Closing date	Tax Requirements
\$5,000 - 30,000		Income Tax Exempt Charity (ITEC). Some of the trusts included in this program require Deductible Gift Recipient (DGR): ie. only to charitable organisations to which gifts are deductible under Sec 30-15 [formerly Sec 78(1)(a) and Sec 78(4)] of the Income Tax Act.

ANZ Trustees Program: Disaster Relief in Victoria

The program makes contributions to disaster or emergency relief in a crisis situation to Victorian organisations. Preferred projects will clearly identify the crisis.

Size of grants (approx)	Closing date	Tax Requirements
\$5,000	Submit a letter of inquiry	Income Tax Exempt Charity (ITEC).

ANZ Trustees Program: Medical Research in NSW

The Program funds projects in New South Wales with the following aims:

- To conduct research for the purpose of and research into a cure for cancer.

Size of grants (approx)	Closing date	Tax Requirements
\$25,000	By invitation	Income Tax Exempt Charity and Deductible Gift Recipient is required, ie. only to charitable organisations to which gifts are deductible under Sec 30-15 [formerly Sec 78(1)(a) and Sec 78(4)] of the Income Tax Act.
Multi-year commitments are preferred		

Other ANZ Trustees Programs

There are separate guidelines on the website for the following:

- ANZ Trustees Medical Research in Queensland
- ANZ Trustees Medical Research for Children in Queensland
- ANZ Trustees Seeing Eye Dogs & Vision Impairment in Queensland

Other Trusts and Foundations

There are separate guidelines on the website for the following:

- ANZ Staff Foundation
- Medical Research and Technology in Victoria Program
- The Alfred Felton Bequest
- The Sylvia and Charles Viertel Charitable Foundation
- The William Buckland Foundation
- ANZ Charitable Trust Australia – Support Fund for Adults with Physical Disabilities

Scholarships administered at ANZ Trustees

As trustee or co-trustee ANZ Trustees administers a range of scholarships, fellowships and educational assistance programs. The principal ones are summarised below. Further information, including eligibility requirements is available from the institution or organisation listed. If you think you may be eligible or would like to apply, contact the listed organisations directly in order make enquiries.

Purpose	Funded by	Closing date	Organisation
Lynley Aitken Fellowship for Graduate Nurses Royal Melbourne Hospital	The William Buckland Foundation	-	Royal Melbourne Hospital
Scholarships for Koori secondary students in Victoria	The Felton Bequest	-	Education Foundation
Scholarships for the advancement of technical education in the printing industry	Collie Print Trust	Applications accepted at any time	ANZ Trustees
University scholarships for students who have attended Hay War Memorial School (NSW)	Hedley Memorial Trust	-	Apply to Branch Manager Westpac Bank Hay NSW
Scholarships for university education for boys in Victoria	Dafydd Lewis Trust	15 December	ANZ Trustees
Scholarships for music students at Melbourne University	Ivy May Pendlebury Trust	-	Faculty of Music Melbourne University
Scholarships for students and ex-students of Sydney Teachers College for study abroad	The Thomas T. Roberts Education Fellowship	-	Faculty of Education University of Sydney
Physiotherapy scholarships in Victoria	Victorian Community Foundation – The Felice Rosemary Lloyd Trust	-	School of Physiotherapy La Trobe University
Annual scholarship for top academic student in grade 6 at Merino Primary School, Vic	Victorian Community Foundation – The Roy & Lucy Lane Memorial Scholarship	-	Merino Primary School
Scholarship for disadvantaged students entering tertiary study in Victoria	VCF - David Burgess Foundation	-	ANZ Trustees
Fellowships and awards for outstanding medical researchers in Australia	Sylvia & Charles Viertel Charitable Foundation	1 May	ANZ Trustees
Scholarships for secondary school students to attend Scotch College and Presbyterian Ladies College	The Alexander Wright Wales Trust	-	Scotch College and Presbyterian Ladies College

PRIVACY STATEMENT AND CONSENTS

This statement applies to ANZ Executors and Trustee Company Limited ABN 33 006 132 332 (**ANZ Trustees**), the other Trustees of the particular charitable trust, settlement or foundation (**Trust**) to which your grant application relates (together, **Trustees**) and advisors appointed by the Trustees or otherwise under the terms of the Trust to advise or assist the Trustees 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 Trustees 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 Trustees
ANZ Executors & Trustee Company Limited
GPO Box 389D, Melbourne, 3001
FREECALL™: 1800 808 910
Facsimile: (03) 9273 6354

FREECALL™ is a trademark of Telstra Corporation Limited ABN 33 051 775 556



ANZ Trustees Programs Application Details

We welcome short, succinct applications that respond clearly and thoughtfully to each item. Applications are assessed according to fit with the guidelines.

A. Project information to be provided (3-8 pages max.):

1. Describe the project, including the expected dates of commencement and completion.
2. Specify the location or place where the project will be conducted.
3. Define the aims of the project and the methods or strategies that will be used.
4. Define the group in need that you wish to assist. Provide quantitative data if possible.
5. Explain the need that is being addressed and why this is important. Provide quantitative data if possible.
6. Describe the benefits, outputs and outcomes the project is designed to achieve.
7. How and by whom will the effectiveness of your project be measured?
8. How will this project be sustained after the grant funds have been expended? [It is important that you respond to this question.]
9. If the project seeks funding for service delivery, give evidence of your organisation's ability and expertise to deliver that service.
10. What other organisations are doing similar work and in what way does your project differ from the initiatives of these other organisations?
11. Provide an itemized budget (income and expenditure) for each year of the project or activity. [This is important in the event that the application can only be part funded.]
12. List the names and qualifications or experience of the individuals who will direct and manage the activity or project, and state whether they are current staff.
13. List the trusts, foundations, corporations and other sources, including governments, from which you are seeking funding for this project.
14. Provide the names and contact details (including telephone) of two individuals or organisations who would speak in support of the application if requested to do so by Philanthropy Partners, ANZ Trustees. Alternatively, enclose letters of support from them.

B. Organisational information to be provided:

1. Give a brief description of the history and purpose of your organisation.
2. Include information on any advocacy or lobbying that your organisation undertakes.
3. List the characteristics of the population that your organisation serves, for example, geographic location, socio-economic status, age.
4. Summarise the current programs and accomplishments of your organisation.
5. How many paid full-time, part-time and casual staff, does the organisation employ? How many volunteers regularly assist?
6. Provide a copy of your most recent annual report, including a list of your board of directors and their affiliations. Identify which of your board members are executive directors. If no annual report is produced, supply a list of directors only.
7. Provide the most recent financial statement, audited if available. This statement should reflect actual expenditures and funds received in the most recently completed financial year.
8. Provide a brief summary of all grants that your organisation has received in the last three years from trusts and foundations.
9. You must have the required tax status to be legally eligible for a grant. You must provide copies of documents that show that the Australian Tax Office (ATO) has endorsed your organisation as an Income Tax Exempt Charity (ITEC) and/or a Deductible Gift Recipient (DGR) [with effect from 1 July 2000 or later]. Refer to guidelines for specific tax requirements for each program.



ANZ Trustees Programs Application Cover Sheet

You must provide the original and one copy of the full application

The information you need to provide with your application is detailed below and on the following pages. Applications must provide the information, including required attachments, in order to be considered. Circle the name of the Program for which you are applying (*one only*) and take note of the taxation documentation you must provide:

Name of ANZ Trustees Program	Tax	Name of ANZ Trustees Program	Tax
National Charitable Initiative	ITEC & DGR	Community Inclusion for the Disabled in Victoria	ITEC
Charitable Purposes in Victoria	*	Accommodation and Care for Older People in Victoria	ITEC
Charitable Purposes in Regional Victoria	ITEC & DGR	Health & Well Being for Older People in Victoria (Currently not accepting applications)	ITEC & DGR
Charitable Purposes in Tasmania	ITEC	Disaster Relief in Victoria	ITEC
Young Indigenous People in Victoria	ITEC & DGR	NSW Medical Research Program	ITEC & DGR

*All organisations must provide ITEC , organisations that also have DGR should provide a copy as well. DGR is required to receive funding from *some* of the trusts included in this program.

Name of Organisation: _____

ABN Number: _____

Postal Address: _____

Street Address: _____

Telephone Number: _____

Facsimile Number: _____

Project Contact Person's Details:

[a] Name & Title

[b] Telephone Number

[c] Email address

Tax Status: You **must** provide certification from the Australian Tax Office [ATO] that shows that the ATO has endorsed your organisation's tax status with effect from 1st July 2000 or later – either by its inclusion in legislation, its inclusion in a publicly accessible register, or by notification.
 Failure to provide this certificate will result in your application being returned.

Name of the project for which you are seeking a grant: _____

Brief description of project: _____

Amount (\$) of grant being requested:

	Year 1: \$	Year 2: \$	Year 3: \$
--	------------	------------	------------

Total budget for the project or activity: _____

Total budget for your organisation (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. 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.

Date: _____

Applicant's signature _____



ANZ Trustees Programs Application Checklist

This application checklist is intended to assist you to lodge a complete application. Complete and sign the checklist and attach a copy behind each application cover sheet.

Have you read the Privacy Statement?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you read the Guidelines?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Does your project fit the Guidelines?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you specified which ANZ Trustees Program you are applying to?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you included copy of your ITEC documentation?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you included copy of your DGR documentation?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you signed the application Cover Sheet?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you included a response to each item under Project Information and Organisational Information?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you included the original and one copy of everything requested?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Signed:		
Date:		

If you have not received an acknowledgement of your application three (3) weeks after the advertised closing date, please phone FREECALL™ 1 800 808 910 and tell us.

FREECALL™ is a trademark of Telstra Corporation Limited ABN 33 051 775 556

ADDITIONAL QUESTIONS		
Does your organisation have an affiliation with a Western Christian Church, excluding the Roman Catholic Church, but including Methodists, the Uniting Church, the Anglican Church, Seventh Day Adventists, the Mormons or the Jehovah's Witnesses? <i>This will help to determine your eligibility to receive a grant from the Harry Dicker Estate.</i>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Was your organisation established by, or is it under the management of a church or denomination? <i>This will help to determine your eligibility to receive a grant from the Otto and Elizabeth Schumacher Trust.</i>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Is your organisation a Catholic welfare and/or Catholic relief agency? <i>This will help to determine your eligibility to receive a grant from the VCF George Perry Fund.</i>	<input type="checkbox"/> Yes	<input type="checkbox"/> No