



Guidelines for Grants

The ANZ Staff Foundation was established in 1988 as a perpetual charitable trust to build a permanent source of funds to meet the real and emerging needs of charities in Australia.

The Foundation is funded by regular contributions made by Australia and New Zealand Banking Group Limited and ANZ staff. Staff at all levels are also actively encouraged to support the work of the Foundation by giving their time and support to some of the projects which the Foundation funds.

The ANZ Staff Foundation has an annual national funding program for a range of charitable projects which offer a direct and tangible benefit to the Australian Community.

The Foundation can only fund charitable organisations, gifts to which are deductible under Section 30-15 [formerly 78(4)] of the Income Tax Act.

Funding Guidelines:

The ANZ Staff Foundation aims to fund projects which:

- give people the skills to manage their lives, provide them with independence;
- offer long-term solutions to the problem of unemployment, especially in rural areas;
- assist communities to conserve resources and protect the environment; and
- provide opportunities for ANZ staff participation as volunteers.

The Foundation does not usually make grants in excess of \$30,000.

ANZ staff involvement: The Foundation will give priority to projects where ANZ staff can be involved; the application should include how ANZ staff can help.

The ANZ Staff Foundation will **not** consider requests from:

- individual applicants;
- political organisations;
- religious or sectarian organisations involved in purely religious/sectarian activities (with the exception of projects which benefit the wider community);
- foundations that are themselves grantmaking bodies;
- mainstream schools; and
- hospitals, medical centres or medical research institutes.

Additionally, the Foundation does **not** make grants for:

- endowments;
- fundraising events/campaigns;
- equipment (including computers), unless it is an integral part of an otherwise eligible project;
- capital investment (eg. building);
- normal operating costs, administration etc.; and
- debt retirement, budget deficits.

MAKING AN APPLICATION FOR A GRANT

Use the cover sheet and complete all details requested

CLOSING DATES FOR APPLICATIONS

Closing dates for applications: 15 January and 15 July each year

Each grant *Application* must be received by ANZ Charitable Services by the closing date listed.

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

Trustee meetings are usually held within twelve (12) weeks of the closing date of applications, however this is subject to change.

Instructions:

- Complete the “Application Cover Sheet” and the “Privacy Statement and Consents”.
- Attach your typed “Application Details”.
 - Answer all of the questions in the order listed.
 - Use the numbers and headings provided.
- Complete a **separate** application for:
 - each project for which you are seeking a grant; and
- Provide us with **three (3) copies** of each separate application.
- Provide us with your organisations completed and signed “Privacy Statement and Consents”.
- ◆ **Do not** include any materials other than those specifically requested.
- ◆ **Do not** send original documents, videotapes or CD ROMS.

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

Post **Email:** charitabletrusts@anz.com ANZ Charitable Services
or **Please note** that if you submit by email, you ANZ Executors & Trustee Company Limited
delivery must also send separately a copy of your GPO Box 389D, Melbourne 3001; OR
latest audited financial statements, annual 21/530 Collins Street, Melbourne, 3000,
report, evidence of current tax status, signed Victoria, Australia
Privacy Statement and Consents and signed
Application Forms.

For Internet access to these Guidelines <http://www.anz.com/australia/charitabletrusts/guidelines.asp>

For further information please contact ANZ Charitable Services:

Freecall: 1800 808 910

Facsimile: (03) 9273 2319

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 will not be accepted



Grant Application – Cover Sheet

YOU MUST PROVIDE 3 COPIES OF THE FULL APPLICATION AND ONE COMPLETED COPY OF THE PRIVACY STATEMENTS AND CONSENTS.

The information which you must provide in support of this application, is detailed below and in the following pages. Applications which do not provide the information or do not include the attachments requested, will not be considered.

Name of Foundation to which you are applying: **ANZ Staff Foundation**

Date of this Application:

Your Organisation's Name:

Your Organisation's Postal Address:

Your Organisations Street Address:

Organisation's Telephone Number:

Organisation's Facsimile Number:

Contact Person's [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 Section 30-15 tax status with effect from 1 July 2000 or later – either by its inclusion in legislation, 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** []

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

Description of Project or Activity:

Amount (\$) of Grant Being Requested:

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 the Australian Tax Office has, with effect from 1 July 2000 or later, endorsed your organisation's tax status (as an income tax exempt and deductible gift recipient) – either by its inclusion in legislation, its inclusion in a publicly accessible register, or by providing us with a copy of the letter of endorsement from the Tax Office.
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 [h] where your organisation seeks funding for service delivery, evidence of your ability and expertise to deliver that service [i] the opportunities for ANZ staff involvement
10. **Project Time:** Anticipated dates of commencement and completion of the project or activity.
11. **Evaluation Measures:** Please explain how you will measure the effectiveness of your project or activity.
12. **Budget:** Provide an itemised/detailed 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 from trusts and foundations administered by or through ANZ Charitable Services.
17. **Referees:** Provide the names and contact details of two individual organisations who would speak or write in support of the application if requested to do so by ANZ Charitable Services.
18. **Privacy:** Please attach your completed Privacy Statement and Consents (see next page).

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 ANZ Staff 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:

ANZ Charitable Services

ANZ Executors & Trustee Company Limited

GPO Box 389D, Melbourne, 3001

Freecall: 1800 808 910

Fax: 03 9273 2319

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

Signed: _____

Name (print): _____

Witness: _____

Date: _____