



ABN 54 585 500 673

TRUSTEES:

MR COLIN LEWIS (CHAIRMAN)

MR HARRY M HEARN AM

ANZ EXECUTORS AND

TRUSTEE COMPANY LIMITED

ABN 33 006 132 332



## *The Collie Print Trust Grant Guidelines & Application*



June 2007

## Background

### *The Collie Print Trust*

The Collie name is closely linked with two important aspects of the printing industry: printing inks and excellence. While the name is part of printing history, Collie lives on today through The Collie Print Trust, a charitable trust set up in 1967.

The late Barbara Collie established the Trust in memory of her father Robert Collie, founder of the printing ink manufacturing business originally known as R. Collie & Co Pty Ltd, and of her brothers, William and George Collie.

When Barbara Collie asked Jack Gamble, a friend and colleague of her father and two brothers how she could best remember them, he suggested that she leave funds to support technical education in the printing and related industries. This she did. Thomas Rank, one of the original trustees says that Barbara 'made it clear that her first preference was the money from 100,000 fully paid ordinary 50 cent shares in R. Collie & Co Pty Ltd should be invested into the industry which had created the family wealth and that this should be the guiding principle'.

The Collie Print Trust makes scholarship awards in accord with the principles set down by Barbara Collie for the advancement of technical education in Victoria, with the wish that regard be given to printing and allied industries.

The trustees of The Collie Print Trust have followed this path, awarding almost 300 scholarships since the Trust's inception.

The trustees of The Collie Print Trust are Mr Colin Lewis (Chairman), Mr Harry M. Hearn AM and ANZ Trustees. The trustees work closely with a technical advisor and with The International Centre for Graphic Technology of RMIT University.

More information about the history of Trust and recent scholarship awards made can be found from the ANZ Trustees' website: <http://www.anz.com/aus/fin/trustees/>

## The Collie Print Trust Scholarships

The Trust invites applications for scholarships, including overseas travel, which will enhance professional development within the printing and allied industries, including for:

- Persons showing promise of future advancement in the industry
  - Students and apprentices
  - Teachers
  - Industry applicants
- Not for Profit industry and educational organisations wanting to bring international leading technical experts in the printing industry to local conferences.

From time to time the Trustees may invite relevant organisations to submit particular proposals of interest.

### *What does The Collie Print Trust fund?*

The Collie Print Trust makes scholarship grants to support technical education in the printing and allied industries in Victoria.

The Trustees will consider making scholarships to:

- Victorian individuals committed to printing and allied industries, wishing to undertake an advanced technical training program. The Trustees will consider funding, wholly or in part, acceptable study or work projects within the scope of the Trust. Applications for funding may include overseas travel for educational visits to approved companies, and/or training institutions and technical seminars.
- Victorian Not-for-Profit organisations, for scholarships which will benefit the printing and allied industries. This may include, but is not limited to, activities such as:
  - Technical professional development for teaching staff
  - Scholarship awards to support students in printing and allied industries
  - Travel scholarships for individuals showing potential in the industry
  - Sponsoring leading international technical experts to local industry events.

## ***Obligations of successful scholarship recipients***

Individuals undertaking a scholarship program commit to:

- Remain within the industry for not less than two years after the scholarship is complete.
- Use the grant entirely for the agreed purpose set out in the application.
- Submit a written report on their scholarship within 3 months.
- Where appropriate, participate in forums, lectures, or discussions on the methods or techniques they have studied.
- Complete the scholarship within the agreed period.

Organisations accepting a scholarship grant undertake:

- That the organisation does not carry on activities for profit and that a statutory declaration to that effect is provided (see page 5).
- That the grant is used entirely for the agreed purpose set out in the application.
- To acknowledge the Trust's contribution in all printed matter, after first discussing the appropriate acknowledgement wording with ANZ Trustees.
- To submit a written report within three months of the conclusion of the grant.

The trustees may, at their discretions, impose additional requirements on grant recipients, and this will be mutually agreed during the application process.

## ***Instructions for making an application***

Applications should be made using the forms included in these guidelines, and addressing all questions.

A completed cover sheet and application checklist, and all relevant attachments must accompany all applications.

Applications are accepted at any time.

Should you wish to discuss your scholarship concept or timing prior to making a formal application, please contact ANZ Trustees on 1800 808 910.

### **Mail two copies of the application to:**

#### **Postal address**

Philanthropy Partners  
ANZ Trustees  
GPO Box 389D  
Melbourne Vic 3001

**Telephone:** (03) 9273 6799  
or 1800 808 910

**Facsimile:** (03) 9273 6354

<http://www.anz.com/aus/fin/trustees/>



## THE COLLIE PRINT TRUST

### Cover Sheet

The Trust invites applications for scholarships, including overseas travel, which will enhance professional development within the printing and allied industries.

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

The Collie Print Trust provides funding to not-for-profit organisations providing technical education, including the provision of scholarships to individuals nominated by these organisations.

Accordingly, individuals applying for a scholarship will need to provide information regarding themselves and their related /sponsoring organisation.

Applications are accepted at any time.

#### *Individual*

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

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

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

Facsimile Number : \_\_\_\_\_

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

#### *Organisation*

Name of organisation : \_\_\_\_\_

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

Name and job title of person responsible for application : \_\_\_\_\_

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

Facsimile number : \_\_\_\_\_

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

#### **Sponsor'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 the Collie Print Trust, including the Privacy Statement and Consent, and agree to those terms and conditions.

**Signature:** \_\_\_\_\_

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

## Application Form

The Trustees welcome short, succinct applications that respond clearly and thoughtfully to each item.

**A. Scholarship information** to be provided – all applicants must complete these questions:

1. Describe the scholarship, including the expected dates of commencement and completion.
2. Specify the location(s) where the scholarship will be conducted.
3. Define the aims of the scholarship, and how these will be achieved. (Note: For overseas travel scholarships, specify the countries, companies and/or institutions where you would like to work or study, and why.)
4. Describe the benefits and outcomes the scholarship is designed to achieve.
5. Specify how and by whom the effectiveness of the scholarship will be measured.
6. How will the lessons learnt from this scholarship be disseminated or shared to benefit the broader industry?
7. Provide the amount sought and an itemized budget for the scholarship.  
*(Note – ANZ Trustees will obtain travel quotes from its approved travel agent if your application is for an overseas travel scholarship.)*
8. Provide the names and contact details (including telephone) of three referees.

**B. Applicant information to be provided** – Please complete either B1 for scholarships relating to an individual *or* B2 for not-for-profit organisations applying:

*B1. Application for a scholarship relating to an Individual:*

1. Describe your present:
  - Employer, your role within the company, and employment period or
  - Tertiary course, name of educational institute, commencement and expected completion date.
2. Describe your career to date and explain why this scholarship will be of benefit to yourself and to the industry.
3. Provide written support for your application from your current employer or educational institute.

*B2. Not-for-Profit organisation information to be provided:*

1. Give a brief description of the history and purpose of your organisation.
2. Summarise the current programs and accomplishments of your organisation.
3. State how many paid full-time, part-time and casual staff the organisation employs and any any volunteers.
4. Provide a copy of your most recent annual report, including a list of your board of directors. Identify which of your board members are executive directors. If no annual report is produced, supply a list of directors only.
5. 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.
6. If relevant, list other sources (including governments) from which you are seeking funding for this project.
7. Indicate not-for-profit status by completing the attached statutory declaration.
8. 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 a Tax Concession Charity (formally referred to as Income Tax Exempt Charity - ITEC) with effect from 1st July 2000 or later – either by its inclusion in legislation, its inclusion in a publicly accessible register.

# Statutory Declaration

## Statutory Declaration to be completed by not-for-profit organisations only

I, \_\_\_\_\_ of \_\_\_\_\_ in the State of Victoria

DO SOLEMNLY AND SINCERELY DECLARE THAT:

1. I am the (insert position held) \_\_\_\_\_ of (insert not-for-profit organisation) \_\_\_\_\_ and am authorised by it to make this declaration on its behalf. The declaration is made to the best of my knowledge, information and belief.
2. The organisation is engaged in technical education in the State of Victoria.
3. The organisation was not formed nor carried on for the profit of any individual.

And I make this solemn declaration conscientiously believing the same to be true and by virtue of the provisions of an Act of Parliament of Victoria rendering persons making a false declaration punishable for wilful and corrupt perjury.

DECLARED by the Deponent

at \_\_\_\_\_

in the State of Victoria

this \_\_\_\_\_ day of \_\_\_\_\_ 200\_\_\_\_\_

\_\_\_\_\_  
(signature of deponent)

Before Me:

\_\_\_\_\_  
(signature of witness)

\_\_\_\_\_  
(full name of witness)

\_\_\_\_\_  
(address of witness)

\_\_\_\_\_  
(qualification of witness)

## APPLICATION CHECKLIST – THE COLLIE PRINT TRUST

This checklist is intended to assist you to lodge a complete application, which in turn will assist timely delays to grant assessment. Complete and sign the checklist and attach a copy behind the application cover sheet (p5).

### For all applicants

- |   |                          |     |                          |    |
|---|--------------------------|-----|--------------------------|----|
| 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 |
| Has the Application Cover Sheet been signed?                                | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| Have you provided a response to each item in the application form?          | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| Have you included all the requested attachments?                            | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| Have you included the original and <u>one copy</u> of everything requested? | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |

### For applicants which are a not-for-profit organisation

- |  |                          |     |                          |    |
|--|--------------------------|-----|--------------------------|----|
| Have you completed and signed a copy of the Statutory Declaration?                   | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| Have you included copy of your Tax Concession Charity (formerly ITEC) documentation? | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |

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

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

**If you have not received an acknowledgement of your application four weeks after posting it, please phone (03) 9273 6799 or 1800 808 910.**

## PRIVACY STATEMENT AND CONSENTS

This statement applies to ANZ Executors & 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 that 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

**Telephone:** (03) 9273 6799 or 1800 808 910

**Facsimile:** (03) 9273 6354