



ANZ Trustees Limited  
ABN 33 006 132 332

*"ANZ & its Staff serving the Community"*

Level 4/100 Queen Street Melbourne GPO Box 389 Melbourne Vic. 3001 Phone (03) 9273 6799 Fax (03) 9273 6354  
Web site: [http://www.anz.com/aus/fin/Trustees/charitable\\_Grants.asp](http://www.anz.com/aus/fin/Trustees/charitable_Grants.asp)

## GRANT GUIDELINES FOR THE ANZ STAFF FOUNDATION

The ANZ Staff Foundation was established in 1988 as a perpetual charitable trust to build a perpetual source of funds to meet the real and emerging needs of charitable organisations 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 a 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:**

#### **ANZ staff involvement:**

The ANZ Staff Foundation will **give preference** to organisations and projects:

- to the extent to which it creates opportunities for ANZ staff to participate as volunteers
- that are already supported by ANZ staff
- that are initiated by ANZ staff in association with community organisations in which they are already actively involved

Your application should include details on how ANZ staff can help.

The ANZ Staff Foundation **aims to fund small projects** (preferred amount of up to \$5,000) in the following areas:

- **Skills and independence:** give people the skills to manage their lives and provide them with independence, in particular financial literacy
- **Environment:** assist communities to conserve resources and protect the environment
- **Local initiatives:** innovative projects from local community organisations
- **Capacity building:** to assist organisations to build their capacity to deliver sustainable benefits to their community (particularly in rural areas)

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



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## GRANT GUIDELINES FOR THE ANZ STAFF FOUNDATION

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
- Bequest programs
- Mainstream schools
- Hospitals, medical centres or medical research institutes

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

- Endowments
- Fundraising events/campaigns and appeals
- Core costs and general operating expenses
- Capital investment eg: buildings
- Debt retirement and budget deficits

**Note:** These grant guidelines are for the ANZ Staff Foundation, 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 and closing dates are current. Applications not based on current guidelines 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.

### **ANZ Trustees Limited (ANZ Trustees)**

ANZ Trustees is 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. Information for organisations seeking a grant from other charitable trusts administered by ANZ Trustees can be found on the website.

These grant guidelines are for the ANZ Staff Foundation. The following trusts, foundations and programs have separate guidelines and separate application processes (see website for a full listing):

1. ANZ Trustees Programs
2. The Felton Bequest
3. Medical Research and Technology in Victoria Program
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.



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## GRANT GUIDELINES FOR THE ANZ STAFF FOUNDATION

### Applying for a grant from the ANZ Staff Foundation:

1. Read all material in these grant guidelines
2. 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
3. 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
4. Provide the original and two copies of each separate application
5. Do not include any materials other than those specifically requested
6. Sign and date all forms
7. Review the checklist and attach a copy behind each application cover sheet
8. Post or deliver the application to Philanthropy Partners, ANZ Trustees. Email submissions will not be accepted.

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

Closing times are 5pm on the date stated. Late applications will not be accepted. If the closing date falls on a weekend or public holiday, you may submit your application up until 5pm on the following business day.

Trustee meetings are usually held within twelve (12) weeks of the closing date.

### Lodgment of applications:

#### Postal address

Philanthropy Partners  
ANZ Trustees Limited  
GPO Box 389  
Melbourne Vic 3001

#### Delivery address

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

**For further information** please contact Philanthropy Partners, ANZ Trustees:

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

**Facsimile:** (03) 9273 6354

**Email:** [charitabletrusts@anz.com](mailto:charitabletrusts@anz.com)

**For Internet access** to these guidelines:

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

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## PRIVACY STATEMENT AND CONSENTS

This statement applies to ANZ Trustees 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 Limited

GPO Box 389, Melbourne, 3001

FREECALL™: 1800 808 910

Facsimile: (03) 9273 2319

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## ANZ STAFF FOUNDATION APPLICATION DETAILS

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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 maximum):**

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. Describe how ANZ staff will be involved in the project
9. How will this project be sustained after the grant funds have been expended? [It is important that you respond to this question]
10. If the project seeks funding for service delivery, give evidence of your organisation's ability and expertise to deliver that service
11. What other organisations are doing similar work and in what way does your project differ from the initiatives of these other organisations?
12. 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]
13. 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
14. List the trusts, foundations, corporations and other sources, including governments, from which you are seeking funding for this project
15. Provide the names and contact details (including telephone numbers) of two individuals (can include ANZ staff) or organisations that would speak in support of the application if requested to do so. Alternatively, enclose letters of support from them. If an ANZ staff member supports your submission please remember to include this person as your referee.

### **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, and 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 a Deductible Gift Recipient (DGR) [with effect from 1 July 2000 or later]



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## ANZ STAFF FOUNDATION - APPLICATION COVER SHEET

**You must provide the original and two copies of the full application.**

Applications must provide the information requested, including required attachments, in order to be considered.

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

If an ANZ staff member supports your submission please include the full name and contact details of this person

**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 1<sup>st</sup> July 2000 or later – either by its inclusion in legislation, its inclusion in a publicly accessible register, or by notification. Failure to provide this information will result in your application being returned.

Name of the project:

Brief description of project:

Amount (\$) of grant being requested:

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 the ANZ Staff Foundation, including the privacy statement and consent to use of personal information, and agree to those terms and conditions.

**Applicant's signature:**

**Date signed:**



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## ANZ STAFF FOUNDATION - 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?	Yes	<input type="checkbox"/> No
Have you included copy of your ITEC and 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
If an ANZ staff member supports your submission have you included the name and contact details of this person?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you included the original and two copies of everything requested?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Signature:		
Date:		

**If you have not received an acknowledgement of your application three (3) weeks after the advertised closing date, please phone FREECALL™ 1800 808 910 and tell us.**

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