



ANZ Trustees Limited, Philanthropy
ABN 33 006 132 332

Kathleen Agnes Back Estate Guidelines and Application Form

ANZ Trustees is inviting applications for grants from the Kathleen Agnes Back Estate for projects in Victoria. The income from the Trust is distributed at the absolute discretion of the Trustee (ANZ Trustees), to: *“such charitable organisations having for their main purpose the care and welfare of animals (preferably if possible horses)”*.

Application Format

Applicants for grants should complete the information requested in the following pages, including details about the project or activity which will be undertaken with the grant. A separate application should be completed for each individual project or activity. Feel free to make copies of this application form, which is also available on our website listed below.

Guidelines

- Projects from the State of Victoria only.
- Applications in relation to the care and welfare of horses are particularly encouraged.
- Applications that address issues of animal welfare through research and training are encouraged.
- Applications for projects for up to three years in length are preferred.
- A total of **\$60,000** is available for 2008 and thereafter the amount available will be \$20,000 per annum.

Closing date for receipt of applications is **1 September**.

Applications for a grant should be sent to:

Kathleen Agnes Back Estate
Philanthropy, ANZ Trustees Limited
GPO Box 389 (OR 4/100 Queen Street)
Melbourne VIC 3001

For enquiries:

Email: Charitabletrusts@anz.com
Facsimile: 03 9273 6354

Website: <http://www.anz.com/anztrustees>

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, ANZ Trustees Limited
GPO Box 389D, Melbourne, 3001

Email: Charitabletrusts@anz.com

Facsimile: (03) 9273 6354

Website: <http://www.anz.com/anztrustees>



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Kathleen Agnes Back Estate

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?
9. If the project seeks funding for service delivery, give evidence of your organisation's ability and expertise to deliver that service.
10. 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.]
11. 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.
12. If applicable, list the trusts, foundations, corporations and other sources, including governments, from which you are seeking funding for this project.
13. 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 ANZ Charitable Services.

B. Organisational information to be provided:

1. Give a brief description of the history and purpose of your organisation.
2. List the characteristics of the population that your organisation serves, for example, geographic location, socio-economic status, age.
3. Summarise the current programs and accomplishments of your organisation.
4. How many paid full-time, part-time and casual staff, does the organisation employ? How many volunteers regularly assist?
5. 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.
6. 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.
7. Provide a brief summary of all grants that your organisation has received in the last three years from trusts and foundations.
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 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.



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Kathleen Agnes Back Estate APPLICATION FORM

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.

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.

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