ANZ Trustees Organisation Capacity Building Program
Major Grant Guidelines

General Background

ANZ Trustees embraces its duty and obligation to honour the wishes of benefactors. Where ANZ Trustees has been entrusted to exercise sole discretion and judgement in grantmaking it has grouped smaller charitable trusts with similar purposes together and developed the ANZ Trustees Organisation Capacity Building Program. This combined program enables ANZ Trustees to offer more meaningful grants for charitable purposes and to increase the effectiveness of individual charitable foundations.

Participating Trusts & Foundations:

- James R Hartley Estate
- Charles Frederick William Taylor Trust
- Victorian Community Foundation - Claire Susan Gardiner Trust
- Alfred Edments Estate
- Ruth Watchorn Estate

Aim of the program:

The **ANZ Trustees Organisation Capacity Building Program** aims to build the capacity of small and medium sized charitable organisations (annual revenue less than $4 million) within **Victoria.** Grants are provided for activities that will support organisations to achieve a step-change in their organisational effectiveness and impact thus enabling them to better achieve their mission.

Areas of focus for this program are:

- **Strategy, governance and leadership capacity:** Developing Board governance; succession planning; leadership development for the Board and CEO; supporting the strategic and business planning process.
- **Change management capacity**: Mergers; partnership development; and contributing to a major organisation-wide change management process.
- **Management capacity***: Financial management and systems; and human resources management and staff development including supporting the salaries of critical strategic positions.
- **Operational capacity***: Fundraising and communications; information technology; compliance and legal issues.

Successful applicants will be able to demonstrate a clear understanding of:

- their organisation's current level of effectiveness and any limiters;
- the future state that they are seeking to move to; and
- what will be required to move the organisation from its current state to its future desired state (which will often come out of a well thought out strategic planning or similar process).

*Support for positions such as a fundraising, communications or marketing manager or for items such as databases will only be considered where the organisation has identified them as a strategic priority and clearly articulated how they fit into the organisation's strategy for achieving step-change.

How to Apply:

Charitable organisations are invited to submit an Expression of Interest (EOI).

EOI closing date: 5pm 15 February

All EOIs will be considered and outcomes include:

- An invitation to submit an Application by **1 May**;
- Deferment of your EOI; or
- Your EOI may be declined.

Grants of up to **$100,000** per annum for up to **3 years** are available.

Types of programs that we fund:

To achieve the Program's aim, the Trustees generally favourably consider applications from organisations that:

- Fall within the Program's Areas of focus;
- Fit within the organisation's strategic plan;
- Enhance the organisation's ability to deliver on its mission to produce tangible outcomes that benefit individuals or the community; and
- Have carefully prepared and realistic budgets.

Definitions:

- **Step-change**: a significant improvement beyond normal, incremental advancement; a quantum leap.

- **Outputs**: are the direct products of program activities, for example, the number of hours participants attended a program. Outputs are typically observed/ measured in the short-term.

- **Outcomes:** are the changes that a program aims to make, and go beyond direct outputs that result from program activities.

- **Impacts**: is the fundamental intended and unintended change that occurs as a result of program activities. Impact can be understood as the sum of the outcomes. Impacts are typically observed/measured over a longer time scale.