

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

The Goal:

The **ANZ Trustees Organisation Capacity Building Program** aims to build the capacity of small and medium sized charitable organisations within **Victoria** which intend to significantly change their level of community impact and/or the way they operate by:

- Developing Board governance, succession planning and leadership development for the Board, CEO and senior management;
- Supporting the strategic and business planning process;
- Contributing to a major organisation-wide change management process;
- Contributing towards merging with another organisation and other implementation costs; and/or
- Supporting the salaries of critical strategic positions.

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 projects that we do not fund:

- Projects that do not fit the aims of the specific Program;
- Projects that may be more suited to corporate sponsorship or investment;
- Projects that may be more suited to government funding Budget deficits;
- Projects seeking support after the loss of government funding;
- General operating and administrative expenses;
- General fund raising campaigns, e.g. annual appeals;
- Core programs funded from other sources;
- Bodies which are themselves grant-making agencies;
- Projects which are auspiced by an organisation not directly involved in delivering the project;
- Requests which seek a contribution to a much larger project;
- Requests which seek a contribution for the continuation of larger scale medical research project;
- Bequest programs;
- Contribution to the corpus of another trust;
- Projects requiring retrospective funding;
- Sectarian or religious bodies where services are limited to their own members; and
- Individuals.