

# The Blum Foundation

## Application Guidelines for Operational & Project gifts

These Guidelines have been prepared and are published by the Polish Community Council of Australia and New Zealand and the Sister Superior of the Sisters of the Resurrection, Essendon, to assist organisations wishing to submit an application to The Blum Foundation. Guidance and advice is provided by ANZ Trustees Limited (Trustees), the trustee and administrator of The Blum Foundation.

Gifts from the Foundation are decided by the trustee following advice from an advisory committee, constituted in accordance with the Will of Stanislaw Blum. The advisory committee is made up of the Sister Superior of the Sisters of the Resurrection and her representatives, as well as community representatives nominated by the Polish Community Council of Australia and New Zealand.

## Stanislaw Blum and The Blum Foundation

The Blum Foundation was established in 1999 in accordance with the Will of the late Stanislaw Blum, a Polish migrant, who throughout his life upheld the values of generosity, benevolence and charity. In a quiet and humble manner, he regularly assisted a broad range of non-profit organisations and charities. However, what was close to his heart was the maintenance of Polish culture and language for future generations in Australia.

This has been demonstrated by The Blum Foundation which is dedicated to the promotion and encouragement of education of the Polish language and culture in Australia.

Stanislaw Blum arrived in Australia in 1949 - a qualified civil engineer from Poland, who spent the duration of the Second World War as a prisoner-of-war. The post-war years were spent working for the US Army rebuilding war-torn Germany. Like many other migrants to Australia, he was committed to a two year work contract. In his case his first two years as a migrant were spent in Whyalla in South Australia.

His first contact with organised Polish community life was in Melbourne, where he was the co-founder and first president of the Polish Technical Club. Opportunities for employment led him to Eildon and eventually Cooma, where he was to spend the last 25 years of his working life. It was there that his pre-war qualifications were recognised and he was employed as an engineer.

He lived quietly and frugally in a workers' hostel with few personal possessions. Apart from his books and personal mementos, he treasured his late 1950s Holden, which he purchased brand new and drove until he passed away.

With retirement, Stanislaw purchased a home in Boronia, in the foothills of the Dandenong Ranges in Victoria. It was his first and only home in Australia. He died in 1998, at the age of 90, never having been married or having children.

It was only with his death, that the level of his generosity was revealed. Through hard work, he acquired properties and investments, which eventually became the basis for The Blum Foundation. The value, which Stanislaw Blum exemplifies, is the generosity of the human heart. He lived with the belief that the average person can assist and make a difference in every small way. Though without a wife and children of his own, he felt that he was part of a larger family - that of the Polish Australian community - which has become one of his beneficiaries.

## Funding Categories

Applications for two types of gifts from The Blum Foundation are invited annually from organisations. Individuals cannot apply other than through a nominated organisation.

### 1. Gifts for organisational support – Purposes:

**Gifts of up to \$1,000** may be made towards the general activities and needs of an organisation, including after hours ethnic schools. The gifts are for the support and development of the activities of the organisation.

### 2. Gifts for special projects – Purposes:

**Gifts of up to \$5,000** may be made to organisations that wish to undertake special projects designed to EITHER meet the cultural and linguistic maintenance needs of the Polish community in Australia OR promote and encourage education of Polish culture and language in Australia.

Special projects are to be new and innovative, over and above the day to day activities of an organisation. Gifts are less likely to be made for the continuation of existing projects. Preference will be given to projects which benefit the broader Polish community in Australia and which target a cross section of the Polish Australian community and are carried out in a co-operative basis.

Projects will need to be completed within a twelve month period and become self-supporting thereafter. There must be a clear outcome or set of outcomes from the proposed project.

With exceptional projects where outcomes can only be achieved over a longer period, a gift extending over a two-year period may be made.

## Eligibility

Organisations applying for gifts must:

- be non-profit and non-political;
- keep proper accounting records and have, at least, yearly financial statement or reports;
- provide information about ABN, tax status and GST registration;
- be an incorporated organisation, or associated with or part of another incorporated organisation;
- have an operational bank account in their organisations name, or be associated with an organisation with a bank account in their name; and
- provide a completed Application Form with all requested supporting documentation.

They must also:

- serve the needs of the Polish Community of Australia and/or
- promote and encourage the education of the Polish language and culture in Australia.

## Exclusions

Gifts will not be given to:

- organisations that fail to submit required documents or information requested by *The Blum Foundation*;
- organisations that have failed to carry out or complete any previous projects funded by *The Blum Foundation*;
- organisations that fail to co-operate with *The Blum Foundation* requirements;
- other Foundations which are themselves grant making bodies;
- individuals;
- political organisations or political activities;
- private profit-making organisations;
- employer and employee associations or organisations;
- payment of debts or mortgages;
- capital expenditure such as land purchase, erection of building, or building renovation;
- commercial or business ventures.

## Conditions for Receiving a Gift

- the organisation receiving the gift will use the whole of the gift exclusively for the applied activity and not for any other purpose;
- the organisation receiving the gift will use its best endeavour to complete the activity within twelve months from the date of the gift;
- the organisation will promptly advise *The Blum Foundation* of any material change that may affect its ability to undertake or complete the activity within twelve months from the date of the gift;
- if for any reason the organisation is unable to undertake the activity or complete it, or the gift is not fully expended on completion of the activity, the organisation should repay the whole of the unexpended part of the gift (as the case may be) to *The Blum Foundation*;
- the organisation will expend the gift only within Australia;
- the organisation will show the gift separately in its books of account and keep records adequate to enable the use of gifted funds to be checked readily;
- the organisation will acknowledge the gift from *The Blum Foundation* in any published or display material or by such other means as *The Blum Foundation* may request; and
- the organisation will give *The Blum Foundation* a final report at the end of the twelve months from the date of the gift or within three months of completion of the activity (whichever is the earlier)

## Assessment of Applications

Listed below are a number of important points which will be taken into consideration when applications are being assessed.

### The organisation

- the aims, objectives, priorities of your organisation;
- the size of the community served by your organisation;

- the capacity of your organisation to manage and evaluate the project and account for the expenditure of the gift monies;
- other resources available to your organisation; and
- the level of financial assistance received from other sources.

### **The project**

- the availability of other, more appropriate sources of funding for the project;
- the possibility that the project may be duplicating existing services, projects and applications;
- the potential benefit to be derived from the project (i.e., what needs it is designed to meet, how large a community is to be served);
- for projects which are expected to continue beyond the twelve month gift period – the availability of ongoing funding from other sources/capacity of the project to become self-supporting or a time frame showing the expected finish date and stages of the project; and
- the viability of the project.

## **How to Apply for a Gift / Project**

Funding guidelines and application form can be obtained from the small grants section of the ANZ Trustees website: <http://www.anz.com/personal/private-bank-trustees/trustees/granting/granting-programs/small-grants/>

Applications must be made on the official form located on the ANZ Trustees website. If you have issues with the PDF form, please contact [charitabletrusts@anz.com](mailto:charitabletrusts@anz.com) for a word version.

Applications can be submitted by post or email to:

### **Postal address**

ANZ Trustees  
Attention: Philanthropy  
GPO Box 389  
Melbourne VIC 3001

### **Email**

[trustapps@anz.com](mailto:trustapps@anz.com)

For any assistance in English contact the ANZ Trustees Granting Team on 1800 011 047 or email [charitabletrusts@anz.com](mailto:charitabletrusts@anz.com)

For any assistance in Polish contact Ms Marzenna Piskozub on (03) 9337 5056 or email [charitabletrusts@anz.com](mailto:charitabletrusts@anz.com)

The closing date for all applications is **1 October** each year.

## **Notification of Gifts**

The announcement of successful applications is usually in December. Successful applicants will be notified in writing of the result of their application.