

THE Wicking
TRUST
JO & JR Wicking Trust

GRANT GUIDELINES

OVERVIEW

The Trust

The J.O. & J.R. Wicking Trust (The Wicking Trust) was established under the terms of the Will of the late John Oswald Wicking, following his death on 11 June 2002, and is one of Australia's most significant trusts.

The Wicking Trust seeks to achieve enduring, positive impact in the areas of vision impairment, care of the aged, problems associated with ageing and Alzheimer's disease. The Wicking Trust is proud to have established partnerships with Vision Australia and the Microsurgery Foundation.

ANZ Trustees is the sole trustee of The Wicking Trust.

The Benefactor - John Oswald Wicking (1918 – 2002)

John Wicking was one of the great modernisers of Australian business.

He is known as a great achiever in every sense and led an extraordinary life. At the outbreak of World War II John Wicking volunteered and joined the A.I.F. where he was regrettably captured and sent to a prisoner of war camp in Germany. After surviving the War he returned home, married Janet Thompson and established a successful property in Euroa. However, his professional and leadership skills became apparent to many business leaders and he was enticed back to the city.

John Wicking, among his many professional achievements, was a Director of Bowater Scott and Norwich Union Insurance, Chairman of Western Pacific Investments, Webster, Cheetham and Kiwi International.

John and Janet Wicking were notable philanthropists and benefactors to many institutions during their lifetime, particularly in the areas of the arts, microsurgery and most notably, vision impairment. They provided immense moral and financial support to the Association for the Blind (now Vision Australia) for over 40 years. Mr Wicking was a Board Member of the Association for 18 years including 12 years as President.

The Will

The Will of John Wicking, under which The Wicking Trust was established, provides for funding to bring about “benefits for the blind or visually impaired, the aged or for persons suffering from Alzheimer’s disease” and includes funding research into “problems associated with blindness or visual impairment, or with ageing, or into the cause or treatment of Alzheimer’s disease, or the care of persons suffering from that disease...”.

Special consideration is given to Vision Australia, a named beneficiary. In addition, the Will provides that the Trustees may grant money to the Microsurgery Foundation. These considerations are treated outside of these guidelines.

New Guidelines

The Wicking Trust underwent a major review in 2011 - 2012 which resulted in the refocus of granting, as outlined in these guidelines. The key changes for 2013 include:

- Retaining the strategic focus on Alzheimer’s disease and ageing;
- To support and invest in organisations which are seeking to make a systemic impact in the ageing and/or Alzheimer’s sectors;
- To fund fewer and more significant programs rather than funding smaller grants for promising projects;
- To create a Wicking Review Panel to encourage review and dissemination of the outcomes arising from Wicking funded programs;
- To conduct an Annual Wicking Symposium to profile funded organisations across the ageing and Alzheimer’s sectors;
- To cease funding detailed medical research into Alzheimer’s disease;
- To cease funding the Incubation Program; and
- To seek Expressions of Interest and then only to invite applications from shortlisted organisations.

The Goal

The goal of the Trust is to achieve systemic change through enduring, positive impact in the areas of care of the aged, problems associated with ageing and Alzheimer’s disease.

The Focus

- *To invest in organisations that are seeking to make a systemic impact in the wellness and quality of life of the aged and/or those with or at risk of Alzheimer’s Disease;*
- *Support the development and implementation of innovative concepts;*
- *Support the translation of research into practice;*
- *Enhance the sharing of learnings and knowledge across the sector; and*
- *To substantially support a small number of organisations over a number of years to achieve impact*

Areas of Interest

Organisations in the aged and/or Alzheimer's sector that:

- foster innovation;
- conduct pilot programs and trials;
- have a commitment to evidence-based research;
- evaluate their outcomes and impact;
- proactively share knowledge across the sector;
- directly or indirectly lead to positive impact for the aged and/or those with Alzheimer's in metropolitan and/or rural Australia;
- nurture leadership and the professional development of staff;
- demonstrate an understanding of 'best-practice' and emerging trends in the sector in Australia and overseas;
- work collaboratively with other organisations in the sector and take a multi-disciplinary approach;
- leverage resources; and
- are well regarded by, and influence key decision-makers including government.

Each grant will be in the order of \$100,000+ per annum and will usually span 3-5 years in duration to achieve impact.

Other Information

Organisations and funded programs must be charitable at law and conducted within Australia.

The Trust prefers not to fund:

- Organisations/activities that do not fit the goal of the Trust;
- Organisations/activities that may be more suited to corporate sponsorship or investment; and
- Organisations/activities that may be more suited to government funding;

Or the following:

- Budget deficits;
- General operating expenses;
- General fund raising campaigns;
- Annual appeals;
- Core programs funded from other sources;
- Conferences and other professional development activities;
- Building costs;
- Equipment, unless it is an integral part of an eligible project or a very special need can be demonstrated;
- Transport or the purchase of vehicles;
- Bodies which are themselves grant-making agencies;
- Bequest programs;
- Contribution to the corpus of another trust;
- Sectarian or religious bodies where services are limited to their own members; and
- Individuals.

Note:

The Wicking Trust previously awarded Medical and Scientific Research Grants via the ANZ Trustee's National Program.

Applications for medical and scientific research grants can still be made using the Mason Foundation's National Medical and Scientific Research Grants – Alzheimer's Disease and Chronic Fatigue Syndrome application form. Please see the Health and Medical Grants section of the ANZ Trustees website: www.anz.com/anztrustees

From time to time ANZ Trustees may take up special projects outside these guidelines and which benefit older Australians.

APPLICATION PROCESS

1. Funding guidelines and application forms for the Strategic Grants Programs can be obtained from the Major Grants section of the ANZ Trustees website.
2. Read all material in these Grant Guidelines before applying.
3. Prepare your Expression of Interest providing all requested information and submit electronically by **1 May at 5pm**. Late submissions will not be accepted.
4. If your Expressions of Interest is successful, you will be **INVITED** to submit a full application by **31 July**.

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

For any assistance contact the ANZ Trustees Granting Team on 1800 011 047 or email charitabletrusts@anz.com.

REVIEW PROCESS

Successful applicants will be required to complete Progress and Final Reports on their funded initiatives. In addition, the Wicking Trust has created a **Wicking Review Panel**. Its role will be to oversee the progress and dissemination of information arising from approved projects and seek formal presentations from approved grant recipients as part of the annual Wicking Symposium.