

The
WILLIAM BUCKLAND
FOUNDATION

WBF

Small, Medical and Major Granting Guidelines – 2014

The **Terms of the Will** of William Lionel Buckland [1960] that established the Foundation upon his death 1964 directs that:

“...income derived there from upon the following trusts that is to say as to one half of such income to divide the same in each year among such public hospitals public benevolent institutions or public benevolent societies in Victoria (being hospitals institutions and societies which are in law charitable or the purposes of which are in law charitable) and in such proportions as my Trustees shall in each year from time to time determine and I HEREBY INDICATE to my Trustees my hope that in the division of such income they will favourably consider charities for children as for example children’s hospitals and orphanages and as to the other one half of such income to apply the same in each year to or for such public scientific or public educational purposes in Victoria which are in law charitable ...
...In administering the public educational purposes to which portion of the income from my estate shall be applied as herein before provided I EXPRESS the wish that my Trustees shall give preference to agricultural and related pursuits.”

In considering how the benefactor’s wishes would best be fulfilled, the Trustees have established the following guidelines and framework.

Mission:

To support activities, organisations and projects which create lasting benefit for the Victorian community.

Focus:

The Foundation chooses to focus on:

- health and community wellbeing, particularly children and young people; and
- scientific and educational activities, particularly agriculture

In particular, the Foundation is interested in:

- breaking the cycle of social disadvantage;
- access to education;
- sustainable land use;
- enhancing youth employment pathways; and
- organisational capacity building.

The Trustees:

Mr C G (Sandy) Clark
Dr Jane Gilmour OAM
Mr Graeme Sinclair
Ms Christine Unsworth
ANZ Trustees Limited – represented by Ms Emma Sakellaris

1. Major Granting Program

The Foundation is permitted to fund only Victorian hospitals, public benefit organisations or for public scientific or public educational purposes for projects which benefit Victorians.

Every proposal undergoes a legal review to determine its eligibility for funding. To be eligible for a grant from the Foundation, organisations must be endorsed by the Australian Taxation Office (ATO) as a Tax Concession Charity (TCC). In addition, the project submitted must be "charitable at law." Please note that the Foundation will not fund projects that are auspiced by another organisation. Genuine partnerships are eligible.

The Foundation provides support for activities, organisations and projects that create lasting public benefit for the Victorian community. In particular it focuses on a) health and community wellbeing, particularly children and young people; and b) scientific and educational activities, particularly agriculture.

The Foundation prefers to support proposals that:

- Involve other partners and a collaborative approach;
- Benefit rural and regional communities;
- Have demonstrable outcomes and social impact;
- Lead to benefits beyond the organisation;
- The learnings and outcomes arising from the project are disseminated across the sector;
- Provide seed funding for development projects and pilots;
- Are sustainable once philanthropic support ceases; and
- Demonstrate a multiplier and/or leverage effect.

The Foundation does not provide grants for:

- Capital works or property purchase;
- Pure health and medical research – funded via the Medical & Scientific Research Program;
- Deficit funding;
- Religion;
- Private schools;
- Individuals;
- Building a corpus of an organisation;
- On-going support services;
- Fundraising and marketing activities or general appeals; and
- Scaling-up or duplicating programs in other areas.

The Foundation is happy to consider multi-year grants for up to three years. It prefers to fund initiatives in the range of \$50,000-\$200,000 per annum. In some circumstances grants may be made outside this range. Where projects are outside the scope of the Foundation's preferred range, organisations are encouraged to seek partnerships with other foundations and/or government bodies.

The Foundation is supportive of groups that are collaborating in search of solutions to complex problems. These collaborations may be with agencies or groups within a particular field of work, or with agencies or groups that bring essential complementary skills to a project.

The Foundation is interested in supporting dissemination of project outcomes. It has a limited interest in funding post-project evaluation, and then usually only when projects have been initiated with the support of the Foundation.

Major Grants – Application Process

To be considered for a Major Grant, an [Expression of Interest](#) (EOI) must be submitted electronically. There are no closing dates for EOIs and all EOIs are considered at the next meeting of Trustees. Successful organisations will then be invited to complete a detailed application.

2. Medical and Scientific Research Program

The Foundation provides an annual allocation to the ANZ Trustees program - Medical Research and Technology in Victoria. This Program recognises that philanthropic funding can make a significant contribution to medical research by focusing small grants of \$6,000-\$30,000 on:

- Basic clinical and biomedical research;
- Clinically relevant research on major health problems;
- Younger investigators establishing new laboratories or their own clinical/public health research program;
- Novel ideas requiring funding for a small discreet project or seed funding for a novel idea that has and with the potential to develop further; and
- Purchase of specialised equipment specific to the nominated research project.

Assessments and recommendations of projects are made by an expert panel.

Organisations seeking funding for medical research should download the specific [Guidelines](#).

3. Small Grant Programs

3.1 William Buckland Small Grants Program

The Foundation is permitted to fund only Victorian hospitals, public benefit organizations or for public scientific or public educational purposes for projects which benefit Victorians.

Every proposal undergoes a legal review to determine its eligibility for funding. To be eligible for a grant from the Foundation, organisations must be endorsed by the Australian Taxation Office (ATO) as a Tax Concession Charity (TCC). In addition, the project submitted must be "charitable at law." Please note that the Foundation will not fund projects that are auspiced by another organisation. Genuine partnerships are eligible.

The Foundation's Small Grants Program provides support for activities, organisations and projects that provide an immediate and direct benefit for the Victorian community. In particular it focuses on a) health and community wellbeing, particularly children and young people; and b) scientific and educational activities, particularly agriculture.

The Foundation prefers to support proposals that:

- Involve organisations that are small to medium in size;
- Meet a demonstrated gap or need in the community; and
- Involve projects/activities that are smaller in size and scale and not seeking a small contribution to a large project (ie Projects should generally have a total cost of \$50,000 or less).

The Foundation does not provide grants for:

- Capital works or property purchase;
- Pure health and medical research – funded via the Medical & Scientific Research Program;
- Deficit funding;
- Religion;
- Private schools;
- Individuals;
- Building a corpus of an organisation;
- On-going support services;
- Fundraising and marketing activities or general appeals; and
- Scaling-up or duplicating programs in other areas.

The Foundation prefers to fund one-off small grants of up to **\$30,000**.

Small Grants – Application Process

To be considered for a Small Grant, a [Small Grant Application Form](#) must be completed. There are no closing dates for Small Grants and all applications are considered at the next meeting of Trustees.

3.2 Small Grants for Small Rural Communities

The William Buckland Foundation, in partnership with FRRR, contributes to FRRR's '**Small Grants for Small Rural Communities**' program in Victoria. The grants from the funds provided by The William Buckland Foundation seek to deliver public benefit to small communities in rural locations in Victoria, particularly for public education or cultural initiatives. Communities with a population of 10,000 or less receive priority and grant amounts are up to **\$5,000**. FRRR from time to time establishes priority areas for allocations.

For guidelines and application forms please go to: www.frrr.org.au

General Information:

1. Read all material in these Guidelines.
2. Submit your application using the current version of the forms as available from the ANZ Trustees website.
3. Do not include any materials other than those specifically requested.
4. **All EOIs and Applications, along with any supporting materials must be submitted electronically to: trustapp@anz.com.** If you have not received an acknowledgement for your Expression of Interest or application within one week of submission, please contact us on the email address or phone number listed below.
5. The EOIs and applications will be assessed in accordance with directions made by the benefactor in his Will. This includes determining whether the organisation and the project are legally eligible to receive a grant. This means that the tax status of your organisation is checked and an assessment is made as to whether the proposal as presented is 'charitable at law'. Applications deemed ineligible will be referred back to the organisation and reported to Trustees.
6. During the research and assessment process, you may be contacted by research staff. Referees may be contacted and other confidential external advice may be sought.
7. Written advice of the Trustees' decision is sent to applicants as soon as possible after the meeting, generally within two weeks of the meeting date. For successful applicants, the letter of advice will detail conditions, if any, attached to the grant, as well as reporting requirements. Annual progress reports and a final report are required.
8. Proformas for these reports can be found on the ANZ Trustees website at www.anz.com/anztrustees

Please read our [Frequently Asked Questions](#) document before applying for any grant programs.

Other Information:

The annual report of The William Buckland Foundation is available on the website. It is accessible by clicking [here](#).

Biography of William Lionel Buckland:

A brief story of the founder is at the front of the Annual Report. For those interested to learn more, the publication *William Lionel Buckland* by David Merrett (2004) is available from public libraries.

Enquiries should be directed to:

Email: charitabletrusts@anz.com

Phone: 1800 011 047