

HMS Bushfires Grants Fund

Application Guidelines

Purpose of Special Fund

The Helen Macpherson Smith Trust has resolved to make a significant direct contribution towards assisting the rebuilding of community life in many of the rural townships damaged or destroyed by the 2009 bushfires.

In response to the bushfire tragedy, the Helen Macpherson Smith Trust has established a special \$2 million Victorian Bushfires Grants Fund. This fund is made available in addition to the Trust's normal grant rounds.

Grants from this special Fund will be made to local and state-wide charitable organisations specifically in support of capacity-rebuilding projects and programs to restore the community life and lifestyles of the damaged Victorian townships.

The goal of the grants is to support and facilitate the communities' own recovery in the post-disaster era, once the immediate emergency aid programs are completed, and government and private sector infrastructure projects are underway. Our grants are not focussed on supplying emergency aid, which the trustees regard as the responsibility of government and the major charities that receive public donations.

Our Trust has given grants across regional and rural Victoria for many years and we know the dedication and capability of many charitable organisations operating in the affected areas. We would be happy to coordinate ideas or work together in a collaborative partnership with our peers and other agencies also seeking restoration of community fabric and networks.

To be eligible for a grant, community organisations must be classified by the ATO as one of the following:

- a Charitable Institution;
- or a Public Benevolent Institution
- or a Health Promotion Charity

Eligible organisations which already have a current active grant from our Trust, but unrelated to the bushfire tragedy, are eligible to apply to this special Grants Fund.

Preferred Grants

- Support for social, education, or health programs which were in existence prior to the fires, but have not been reinstated due to a lack of community capacity or infrastructure
- Support for the development of new programs or projects designed to help rebuild the lifestyle of a ravaged community
- Contribution towards additional equipment, furniture and fittings, materials and other resources used for charitable purposes, such as aged and disability care, education or health
- Contributions towards capital appeals and fit-outs will be restricted in order to spread benefits across many of the affected communities
- Capacity-building programs to assist eligible charitable organisations to meet new community needs emerging from the bushfire tragedy

Grant Exclusions

- Projects where the benefits derived are shared with communities outside of Victoria
- Programs/projects deemed to be the responsibility of Federal, State and/or Local Government
- Requests for retrospective funding, meaning support for programs that have already taken place
- Requests for recurrent administrative costs or deficit funding of an organisation
- Funding requests via an auspice institution – unless there is an identified public social benefit also being derived by the auspice charity from the grant, or where the auspice charity retains the right of ownership of any property derived from the grant or where the auspice charity is the lead partner of a group of organisations responsible for driving the project as project managers.
- Support for sporting clubs, film making projects, theatre productions and exhibition sponsorships, unless related to a welfare need.
- Direct grants to individuals. The Trust is precluded by law to give grants direct to individuals or their families such as:
 - ❖ cash hand-outs, food parcels or other emergency relief support
 - ❖ building repairs and/or reconstruction of family homes
 - ❖ replacement of cars, trucks or other equipment
 - ❖ travel expenses, personal study, or attendance at conferences

Closing Dates for Applications

Closing dates for applications to the HMS Bushfires Grants Fund are:

- 30 April 2009
- 30 September 2009
- 31 January 2010
- 30 April 2010

Grants normally would cover programs or projects for the duration of one year, but grants for a period of up to three years will be considered if deemed appropriate.

Grant approvals will be advised in July and December 2009 and April and July & December 2010.

Guidelines and application forms can be downloaded from www.hmstrust.org.au

How to apply to the Victorian Bushfires Grants Fund

All applications we receive are given careful consideration and we are always happy to discuss your proposal prior to submission.

Step 1 - Does your project fit within our grant programs and priorities?

Please read through the list on page 2 of what we fund and don't fund.

Step 2 - Check your eligibility

Before preparing your submission make sure your organisation is eligible to apply to the Trust for a grant.

- The Trust can only give grants to Victorian charitable institutions.
- Your organisation must be endorsed by the Australian Tax Office (ATO) as a:
 - Charitable Institution; or
 - Public Benevolent Institution; or
 - Health Promotion Charity

and with "Income Tax Exemption" tax concession status. Please note this is not the same as Deductible Gift Recipient (DGR) status.

We cannot make grants to other "funds" or "foundations" so organisations endorsed by the ATO as a "Charitable Fund" are ineligible for our consideration. To find out your organisation's endorsement, please visit the Government's ABN Lookup website at <http://www.abr.business.gov.au> and do a search on your organisation. If you have the required endorsement and are proceeding with your grant proposal, please print out a copy to include with your application.

- Your organisation must be based in Victoria, and its activities predominantly confined to Victoria.
- If it is part of a national organisation and/or has significant operations outside of Victoria (ie offices/branches), it must have a separately constituted and autonomous Victorian State branch with its own Board of Management. An example of this is the Australian Red Cross. We also require written assurance that the organisation does not intend to operate or apply any of the grant funds outside Victoria.
- To review the Standard Grants Conditions and note this on the Application Coversheet.

Step 3 – Prepare your full proposal

Your proposal should include the following:

1. Grant Application Summary form

This form, which you can download from our website, provides key organisation, contact and request information to assist us to process your grant proposal. Only applications that are signed off by the CEO (or equivalent position) and for Universities the Vice-Chancellor, Deputy Vice-Chancellor Research or Head of Research will be considered.

2. Detailed Project Description

This should include the following details:

- a description of the project and its objectives.
- evidence showing a need for the request and its value ie. the context in which your request has been formulated, including any other similar programs or research, to support your application.
- a detailed 'bottom-up' budget of the proposed project is required to ensure that it is realistic to the goals of the project and that it has been compiled in sufficient detail, and not a 'broad-brush' ambit claim (Do not include GST as grants made by the Trust are regarded as gifts for the purposes of GST legislation and therefore not subject to GST (refer ATO GST Ruling 2000/11)).
- timeline of the project.
- dissemination/communication of the project outcomes.
- project evaluation methods.

3. Attachments

- a copy of the most recent Annual Report (for a year-end not more than 15 months ago), including full audited accounts is required to ascertain the financial viability, sustainability and financial efficiency of the applicant organisation.
- a copy of your Constitution including Objects and/or Statements of Purpose.
- a copy of your Tax Concession endorsement as outlined in Step 2 printed in the last 30 days.
- any letters of endorsement supporting the project and/or your organisation.

Step 4 - Other Considerations

- The Trustees will only consider ONE application per eligible organisation per grant round
- Organisations that are a party (other than the lead applicant) to a collaborative partnership application may also apply for a grant in their own right.

Step 5 - Submit your proposal

Before mailing your request to us, please check back over the list above and ensure you have provided all the items and information we require.

Applications should:

- Include all required material
- Be clear and concise
- Set the context
- Foster partnerships (where possible)

If you have any queries, please do not hesitate to contact us. We prefer to discuss your application with you beforehand, rather than receive an incomplete or underdeveloped proposal.

Please mail one copy (unbound) of your application to:

Mr Darvell M Hutchinson, AM
Chairman
Helen Macpherson Smith Trust
Level 43
80 Collins Street
Melbourne Vic 3000

If you have any queries, please call (03) 9631 2599 or email grants@hmstrust.org.au