

Overview

Grants Program



The Helen Macpherson Smith Trust is a perpetual charitable trust established in 1951 by the late Helen Macpherson Schutt (née Smith).

Grant Application Closing Dates

Grants rounds are usually conducted three times per year with the following closing dates:

- | | |
|---------------------|--|
| 31 January | (For consideration at the March Grants Committee Meeting) |
| 30 April | (For consideration at the June Grants Committee Meeting) |
| 30 September | (For consideration at the November Grants Committee Meeting) |

Grantmaking Goals

The Trust's grantmaking goals are to support:

Immediate and long-term needs:

Both immediate needs and to build capacity across Victorian communities to affect long-term change towards a better quality of life.

The wider community:

The selection of a range of five preferred target areas within which grants are to be sought. The selection of target areas will be reviewed from time to time.

The extent and range of grants:

Grantmaking of at least 4% of the Trust's capital value annually amongst a range of Victorian projects and programs of differing size, scope and complexity including:

- strategic and innovative projects/pilot programs;
- projects that involve partnerships or collaborative-based models of grantmaking with peer foundations, community groups, corporations and/or Government;
- charitable organisations in rural and regional Victoria to recognise the pioneer pastoral wealth generated by the founder's forebears.

The effectiveness of outcomes:

Sound evaluation and monitoring procedures to assess the effectiveness and outcomes from the Trust's larger grants.

Target Areas

Rather than engage across the grant making spectrum, the Trust has determined to support the needs of the Victorian community by selecting the following five target areas for particular support:

- **Education and Vocational Training**
Programs that assist the Victorian community to improve the educational and vocational outcomes for the community and so to provide opportunities for people to contribute to society.
- **Rural and Regional Victoria**
Programs to strengthen rural and regional communities.
- **Land Stewardship**
Support for programs that enable community organisations to undertake land care activities. The Trust wishes to target funding at bringing organisations together on projects so that more effective outcomes can be achieved in environmental management.
- **Arts and Culture**
The main thrust of the Trust's grantmaking in this area will be an Arts Prize. This major program is in development. In the interim, some minor arts and cultural grants may be made.
- **Health and Medical Research**
The Trust will only make one healthcare and medical research grant at a time and this will be substantial. The Trust will award a research Fellowship once every five years with funding up to a maximum of \$250,000 per annum. The Fellowship is designed to attract a mid-career researcher. The Fellowship will be awarded to an approved Victorian research institute or university.

Mindful of ever-changing needs in society, the Trust reviews from time to time, the target areas for support over the forthcoming period.

Grants Structure

The Trust currently channels its grant funds into two streams:

Small Grants

The Small Project Grants program makes grants for small scale projects across the target areas (except Health and Medical Research) to a maximum of \$25,000 per grant.

Under the current guidelines, universities and large institutions are not eligible to apply for Small Grants; they may apply for a larger Impact Grant.

Impact Grants

The Impact Grants program makes grants above \$25,000 across the five target areas.

Overall, they express the Trust's desire to make a significant contribution or to achieve impact through social investment in the particular area of current community need and priority.

Impact Grants may be provided over one to five years and are designed to fund a “stand alone” program, project or activity across the target areas that:

- responds to a specific need
- is developmental and/or innovative
- is based on a significant body of knowledge or research
- includes an outcome evaluation
- details the strategy(s) for sustainability (if appropriate) beyond the grant period

Multi-year Grants

The maximum span of years over which the Trust will make a multi-year commitment is five years. These grants will be the exception rather than the rule but the Trust anticipates making grants over a three year period for substantial sums of money to allow charitable institutions to make a difference in areas of need.

After the initial grant payment, subsequent payments are conditional upon successful completion of agreed milestones and progress reports.

Areas of Exclusion

The Trust is only able to support income tax exempt charitable organisations that operate solely within Victoria or who have a Victorian Board of Management, producing separate financial statements, and the project being funded must take place only within Victoria.

Applications for the following will not be supported:

- Funding requests by an auspicing institution.
- Deficit funding or organisations with a potential negative equity position.
- Retrospective funding, meaning support for programs that have already taken place.
- Recurrent administrative costs.
- Projects/programs which are usually conducted on an annual or other regular time basis eg. camps, festivals etc.
- Infrastructure projects and service programs considered to be government responsibility at a Federal, State or Local Government level.
- Grants direct to individuals, including travel expenses, personal study or attendances at conferences or indirectly to individuals eg. cash handouts and reimbursements.
- Grants for preparation of websites.
- Political organisations.
- Sporting clubs, film making projects, theatre productions and exhibition sponsorships, unless directly related to a welfare need.
- School building projects, including private schools, unless the projects will also be used for a wider community benefit.
- Conferences and seminars.
- Purchase of buses and/or cars.