![Helen Macpherson Smith Trust logo]

Impact Grant – Stage 1 Form

Please note this document is a sample only and is subject to change. It is intended to give an indication of the questions contained in the online application form.

All Impact Grant proposals need to be discussed with HMSTrust Grants staff initially.

The Stage 1 online application form can only be accessed via a special individual pass code provided by HMSTrust Grants staff following discussion about your project. If your project meets HMSTrust funding guidelines for an Impact Grant, an application access code will be provided. Applications can only be submitted ONLINE when the grants round opens. If you wish to discuss an application, contact us here.

If your project is approved to progress to a Stage 2 application, you will have the opportunity to update and expand on the information provided in this form.

1. Organisation and Contact Details

- Organisation entity name *as listed against your ABN on the* Australian Government ABN Lookup *website.*

- Trading name: ABN Australian Government ABN Lookup

- Organisation charitable status:
  Organisations must be a Charity registered with the Australian Charities and Not-for profit Commission (ACNC) as confirmed at the Application Gateway on our website. See Eligibility Help *for more information.*

- Postal Address:
- City: State: Postcode:
- Telephone:
- General Email:
- Website:

Principal Representative (CEO or equivalent)

- Title:
- First Name: Last Name:
- Suffix:
- Position title:
- Telephone:
- Email:

Project contact (if different to principal representative). *This is the person that will be contacted if we have questions about the project, and will receive notifications about outcomes and future reporting.*

☐   Same as principal representative

- Title:
- First name: Last name:
- Suffix:
- Position title:
- Telephone:
- Email:

Organisation background

- Provide a brief description of your organisation, including the year it was established: *(maximum 50 words)*

- Provide a brief overview of your organisation's main purpose and primary activities: *(maximum 100 words)*

Organisation Type
Select the option that best describes your organisation:

- Arts & Culture
- Community Service
- Education
- Employment Service
- Environment/conservation
- Health service
- Library, gallery or museum
- Local government
- Neighbourhood house
- Other
- Research organisation
- Self-help group
- Sporting club or association
- Welfare organisation

2. Organisation Financial Details

An electronic copy of your organisation's most recent approved financial statements (no older than 18 months), must be attached when lodging this application. See 'Sign-off' tab for further details.

Please provide the following information based on your most recent financial statements:

Organisation Financial Details from your most recent Annual Report:

Financial year:

Total assets: Annual income (total):
Less Total liabilities: Less Annual costs (total):
Net Worth (assets - liabilities):   Net Income/Deficit:

Human Resources

- Number of full-time equivalent employees:

- Number of volunteers:

- Total number of volunteer hours per annum:

3. Program Selection

Select the **program** which clearly fits your project. **You can apply in one program only.**

- o Education
- o Community
- o Arts and Culture
- o Environment
- o Health

Focus Area/s: Complete the section that applies to the Program selection you have made above. Only **ONE** program section should be completed. Note: A strong match in one Focus area is better than three weak matches.

Select the focus area/s that your project matches, and then briefly describe how your project meets that focus area. Complete ONLY the section that corresponds to your selected Program.

EDUCATION. *Goal: To improve access to quality, relevant and supportive education through initiatives that provide disadvantaged Victorians with the opportunity to reach their full potential.*

- **Engaging and retaining P-12 students**
  Initiatives that target students at risk of disengaging from school. (*maximum 30 words*)
- **Creating vocational pathways**
  Certified education and training pathways that lead to meaningful work. (*maximum 30 words*)
- **Transitioning migrants and refugees**
  Education and training opportunities that will enable migrants and refugees to transition into Victoria's culturally diverse communities. (*maximum 30 words*)

COMMUNITY. *Goal: To improve the outcomes of current and future generations of Victorians and enable them to build fulfilling lives as active participants in a cohesive society and strong economy.*

- ➢ **Strengthening family cohesion**
  Programs and services that strengthen the family unit. (*maximum 30 words*)
- ➢ **Advancing early childhood development**
  Initiatives that focus on the social, emotional and cognitive development of disadvantaged pre-school children. (*maximum 30 words*)
- ➢ **Building financial resilience**
  Programs that improve financial knowledge and behaviour of vulnerable Victorians, and provide access to quality financial services and products. (*maximum 30 words*)

ARTS AND CULTURE. *Goal: To increase local participation, encourage public engagement and develop a sense of place by giving voice to communities through creative initiatives.*

- ➢ **Enabling social inclusion and access**
  Creative projects that facilitate and develop increased participation, understanding and respect for Victoria's diverse and disadvantaged communities. (*maximum 30 words*)
- ➢ **Developing digital capability**
  Strategic adoption of digital platforms, resources and tools that enable arts organisations to function more sustainably and effectively, attract participation from new groups of Victorians, and increase audiences. (*maximum 30 words*)
- ➢ **Expanding the creative economy**
  Innovative projects that generate new jobs and expand employment opportunities for Victoria's creative sectors. (*maximum 30 words*)

ENVIRONMENT. *GOAL: To protect and improve Victoria's natural environments through responsible conservation projects that advance cooperative and sustainable practices.*

> **Conserving and restoring biodiversity**
> Projects that benefit at-risk habitats and species indigenous to Victoria. (*maximum 30 words*)

> **Protecting natural systems**
> Projects that protect and improve land and water systems to meet the environmental and economic needs of current and future generations. (*maximum 30 words*)

> **Nurturing sustainable landscapes**
> Initiatives that encourage sustainable land practices and improve connectivity across landscapes. (*maximum 30 words*)

Health Advancement: *GOAL: To improve affordable access to quality health services in rural and regional Victoria.*

There is currently only one focus area for the Health Program. Briefly describe how your project addresses this focus area

> **Improving access to mental health services in rural and regional Victoria**
> Projects that provide affordable access to a full range of reliable, quality mental health services for Victorians living in rural and regional Victoria. (*maximum 30 words*)

4. Project Details

- **Project title** (*maximum 15 words*)

- **HOW will the funds be used? Select the TYPE OF SUPPORT that best fits your project. Select one type of support only.**
    - Activities/services
    - Capital works, fit-out, equipment
    - General operations
    - Organisational development/building capacity
    - Professional development
    - Program funding
    - Research
    - Scholarships/Fellowships
    - Social enterprise

- **Funding Purpose:** (*maximum 30 words*)
  WHAT is the key purpose of your funding request?
  Example 1 – To trial and evaluate a strategy to better support businesses so that they can create meaningful, sustainable employment opportunities for people with a disability.
  Example 2 – To implement recommendations arising from a scoping study for new educational programs addressing literacy for migrant and refugee families in south eastern Melbourne.
  Example 3 – To deliver a youth entrepreneurial education trial in NE Victoria.

- **Project Description:** (*maximum 70 words*)
  WHAT is the project? Provide a succinct summary of your proposed project in no more than 70 words, clearly describing what it is, the beneficiaries and the location. *If successful, this summary may feature in the HMSTrust annual report and on the website.*

- **HOW will you implement the project?** (m*aximum 250 words*)
  List key stages/activities. *Be clear as to the steps you will take in delivering your project, with reference to what activities will take place, who will be involved, how many participants/beneficiaries, where the project will take place etc.*

- **WHY is the project needed?** (*maximum 100 words*)
  Clearly state the social need that your project aims to address**.**

- **What is the duration of your project?**
  HMSTrust does not fund retrospectively. The commencement of your project must be AFTER the published date on which HMSTrust will notify application outcomes. See Grant Dates for details.

  - Anticipated **start date** of the project:
    For successful grants, payment/s and reporting dates will be scheduled based on the project start date notified.

  - Anticipated **end date** of the project:

5. Matching our Objectives

Your project should meet **at least three** of HMSTrust's five key objectives listed below, **of which one must be selected as a primary objective**. This section is a major evaluation tool, if your project is successful, you will be asked to report against these objectives. See Key Objectives for details.

Explain how your project's objectives match HMSTrust's key objectives. You can refer to successful case studies on HMSTrust's website to see examples of successful matched objectives. Your objectives need to be specific to the project and not across broader organisation activities.

Begin by selecting your **primary objective:**

Now complete at least three of the following boxes, including the box matching the primary objective selected above:

- **Strengthening rural and regional Victoria**
  To strengthen the capacity, resilience and potential of communities in rural and regional Victoria.
  (*maximum 30 words*)

- **Reducing inequality**
  To reduce disadvantage, protect basic rights and extend opportunities for Victorians, with a special interest in equity for women, girls and Indigenous Victorians. (*maximum 30 words*)

- **Enabling financial sustainability**
  To enable viable and sustainable initiatives that will continue to have an impact well beyond the period of our grant. (*maximum 30 words*)

- **Building organisational capacity**
  To develop the capabilities and capacity of organisations, communities and sectors to improve long-term benefits to Victoria. (*maximum 30 words*)

- **Encouraging collaboration and partnership**
  To maximise the impact of the Trust's social investments through collaboration and partnerships across community sectors. Partnerships include other service providers and/or other funders including government.
  (*maximum 30 words*)

- Collaboration and partnership (*maximum 250 words*)
  List partners specific to this project and identify the value, including in-kind, that they bring:

Target areas

Indicate which **Local Government Area/s** within Victoria will directly benefit from your project:
Find your LGA here, or

☐ My project is statewide

Indicate which **population group/s** will be served by your proposed project. You can select up to a maximum of three population groups:

☐ Ethnic Communities   ☐ Disadvantaged

☐ Migrants / Refugees   ☐ Indigenous

☐ Disabled   ☐ General Community

What **age groups** will your project target? If your project is not specific to age groups, then select 'Not Targeted'.

☐ Infants (0-5)   ☐ Adults (25-65)

☐ Children (6-13)   ☐ Older Adults (Over 65)

☐ Young Adults (15-24)   ☐ Not Targeted

Will your project have a specific **gender focus**?

☐ Females

☐ Males

☐ Not targeted

6. Project Budget

Budget Template
You will need to provide details of income and expenditure for your multi-year project.
- Click here to download the Impact Grant budget template.
- Select 'Save' to save the budget template into the preferred folder on your computer.
- When you are ready to lodge your online application form, you will be required to attach this budget template.

Please ensure the numbers entered below match the amounts included in your budget template and that the amount requested from HMSTrust is **exclusive** of GST.

- Total project budget: $_____

- Total Amount requested: $_____
  (. Value may not be less than $90,001. Amount requested to be exclusive of GST)

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Please indicate the amount of funding requested in each year of your multi-year project (must add up to the total amount requested).

Multi-Year funding request up to 3 years:
- Year 1 $_____
- Year 2 $_____
- Year 3 $_____
- Total Confirmed Income: $_____
- Total Unconfirmed Income: $_____   (excluding amount requested from HMSTrust):

- Is your project planned to be on-going? YES / NO

- If your project is to be on-going, what is your long-term strategy for sustaining the project after this funded period? (*maximum 100 words*)

7. Additional Information

Why is your organisation best placed to deliver this project? (*maximum 100 words*)

Is there any additional important information about your project that has not been covered above?
(*maximum 100 words*)

8. Conditions and Attachments

HMSTrust Grant Conditions Form

Download and read the HMSTrust Standard Grant Conditions Form to ensure that your organisation can and will comply with the conditions, should your organisation be successful.

Attachments

When lodging your online application form, you will be required to attach the following documents:

- Most recent approved annual Income Statement and Balance Sheet

- PDF of your most recent annual report

- If you are a University applicant applying for a research project, upload a letter signed by your Research Office confirming that your application is the one approved by the University for this grants round.

- You may upload up to 2 letters of support (additional letters can be scanned into the one pdf document and attached if required)

9. Sign-off

As the principal representative of the organisation, I confirm that the information provided in this application is correct at the time of submission and I agree:

- ☐ That my organisation will comply with HMSTrust's Grant conditions should this application be successful

- ☐ That my organisation is either: a charity based in Victoria and operating solely within Victoria; or a charity operating both inside and outside Victoria, with its head office in Victoria.

- ☐ That HMSTrust may forward and/or discuss this application with external reviewers and/or other trusts and foundations if required.

- ☐ That HMSTrust may use general information contained in this application for promotional purposes.

- ☐ I have attached all of the required documentation.

Principal Representative name (This sign-off to be from the CEO or equivalent; or Head of Advancement for universities):

Position:

Date:

STAGE 2 ADDITIONAL QUESTIONS

If your project is approved to progress to a Stage 2 application, you will have the opportunity to update and expand on the information provided in Stage 1, and will be required to respond to the further additional questions.

Outcomes

Please note that should your application be successful you will be required to report against your project's expected aims and outcomes.

We recommend that you use dot points to provide concise summaries in the following sections. Do not generalise. List specific facts and figures, for example; "this project will benefit the following five communities (list them) and approximately 5,000 youth" rather than "this project will benefit many communities."

- **Briefly describe the key expected outcome/s of your project:** (*maximum 100 words*)
  Be clear about the expected changes in knowledge, actions or conditions as a direct result of your project.

- **How will you measure the outcomes of your project?** (*maximum 100 words*)

- **What plans, if any, do you have to share the outcomes of your project?** (*maximum 100 words*)

Annual Milestones

List your key annual milestones for the duration of the project. List outputs (activities, events, services, products delivered) and outcomes expected (changes in knowledge, actions or conditions). If successful, you will be required to report against you project milestones and objectives each year before 2nd and 3rd year grant payments are made.

- Year 1 Milestones (*maximum 100 words*)

- Year 2 Milestones (*maximum 100 words*)

- Year 3 Milestones (*maximum 100 words*)

Additional Questions

Please be succinct in your response to the questions below.

- **What work has been achieved to date on this project?** Eg. Research, scoping, pilot. (*maximum 300 words*)

- **Describe a project on a similar scale delivered by your organisation.** What were the outcomes? What were the key learnings? (*maximum 300 words*)

- **Who are the other confirmed or potential contributors/partners/stakeholders, and how will they be involved?** Identify if they have confirmed their commitment to this project already. (*maximum 300 words*)

- **Who are the key project personnel?** Provide their titles and roles for this project. What are their qualifications and experience? (3-4 sentences) What succession planning do you have in place should there be changes in key personnel? (*maximum 300 words*)

- **What are the key risks to the success of this project, & how will you mitigate these?** (*maximum 300 words*)

- **Within the overall budget, what are the priorities?** Could the project proceed if not all income sought is forthcoming? (You may wish to review and update/amend the budget original submitted) (*maximum 300 words*)

- **How does this project align to your organisation's mission and current strategic plans?** (*maximum 300 words*)

- **Further questions, specific to your project, may be included in Stage 2.**