**Impact Grant Application Form 2020**

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 and to assist approved applicants to prepare their answers.

***The online application form can only be accessed via a special individual pass code*** ***provided by HMSTrust Grants staff following discussion about your project***. Applications can only be submitted ONLINE when the [grants round opens](https://hmstrust.org.au/grantseekers/grant-rounds/). If you wish to discuss an application, please submit an email enquiry via the [Contact Us](https://hmstrust.org.au/contact/) page of our website.

**1. Organisation and Contact Details**

* Organisation entity name *as listed against your ABN on the* [Australian Government ABN Lookup](http://abr.business.gov.au/) *website.*
* Trading name: ABN [Australian Government ABN Lookup](http://abr.business.gov.au/)
* 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](http://hmstrust.org.au/grants/eligibility) *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 overview of your organisation, including the year it was established, main purpose and primary activities (*maximum 150 words*):

**Organisation Type**

Select the option that best describes your organisation:

* Arts and Culture
* Community Service
* Education
* Vocational training/ Employment
* Environment/conservation
* Health service
* Other
* Research 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. Key Request Information**

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

**Funding Purpose:** *(maximum 30 words)*

What is the key purpose of your funding request? If successful, this summary will feature in the HMSTrust annual report and on the website.

*Example 1* – To implement an evidence based, non-clinical, low intensity mental health program, free of charge, to rural and regional communities in partnership with the local Primary Health Network

*Example 2* – To trial and evaluate a program enabling place-based organisations to understand financial vulnerability and take action to address financial hardship; build capability; microenterprise skills; and access to safe, affordable finance..

*Example 3* – To scale a highly successful youth entrepreneurial education program across schools in Victoria.

**Grant amount requested $:**Amount requested is to be exclusive of GST. (Value may not be less than $90,001.)

**Explain the impact you aim to achieve:** *(maximum 70 words)*

What is the intended long-term impact of this request? We only fund work that is designed to have wider benefits - beyond the direct participants and the life of a project. We try to fund work that seeks to address root causes that will contribute to systems change and/or change sector practice.

**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](http://hmstrust.org.au/grantseekers/grant-dates/) for details. For successful grants, payment/s and reporting dates will be scheduled based on the project start date notified.

Anticipated start date of the project:

Anticipated end date of the project:

**4. HMSTrust Program and Key Objectives**

**4.1 Program**

Select the **program** to which you are applying. **You can apply in one program only.**

⬜ Education ⬜ Community ⬜ Arts and Culture ⬜ Environment ⬜ Health

**Focus Area/s:** Complete the Program section that matches your choice above. Only **ONE** programsection should be completed, and you need to match at least one Focus Area within the selected Program. A strong match in one Focus area is better than three weak matches.

Select one or more 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 build parenting skills and improve long-term outcomes for children.  
(*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 Victorians exposed to risk. (*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.*

* **Building social inclusion and access**

Arts projects that facilitate diverse representation, participation and engagement to build understanding and respect. (*maximum 30 words)*

* **Developing digital capability**

Strategic adoption of digital platforms, resources and tools that enable arts organisations to be more effective and sustainable. (*maximum 30 words)*

* **Expanding the creative economy**Supporting organisations to build the business skills and financial independence of Victorian arts workers and artists to support viable careers. (*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.** *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)*

**4.2. Matching our Objectives**

Our five Key Objectives represent HMSTrust’s core funding criteria. Your project is required to match at least three of our five key objectives which are listed below, including **Collaboration and Partnership** which is considered essential for grants at this level of funding.

Explain how your project's objectives match HMSTrust's key objectives. You can refer to successful case studies on our website to see examples of successful matched objectives. Your objectives need to be specific to the project and not across broader organisation activities. Of the three you select, you will be asked to nominate a primary objective.

**Please complete at least three of the following boxes, including Collaboration and Partnership:**

* **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 support organisations to be more viable and sustainable. *(maximum 30 words)*

* **Building organisational capacity**

To develop the capabilities and capacity of organisations, communities and sectors to deliver 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.

*HMSTrust values collaboration. Who are the other confirmed or potential contributors/partners/stakeholders, and how will they be involved? Identify if they have committed to this project already, and identify the value, including in-kind, that they bring. (maximum 300 words)*

**5. Project Details**

**Why is the project needed?** (*maximum 300 words)*

Clearly state the social need that will be addressed by your project**.** Include evidence of need.

How does your project address a gap in existing service provision? Include evidence to support your statement.

**How will you implement the project?** (m*aximum 250 words)*

Describe how the project will be implemented to address the social need. List your KEY OUTPUTS that you plan to undertake to deliver the project. These are the key activities, products or services to be carried out to reach your intended outcomes. Be clear as to the steps you will take in delivering your project, with reference to what actions will take place, who will be involved, how many participants/beneficiaries, where the project will take place, etc. It is expected that your key outputs will determine the milestones of your project as detailed further in the Outcomes section of this application. Example 1: Deliver 50 financial counselling train-the-trainer sessions to 20 case workers per session in Bendigo region; Example 2: Deliver detailed 3-year fundraising and marketing plan, and implement action plan.

**What work has been achieved to date?** e.g. research, scoping, pilot (*maximum 300 words)*

**Who are the key project personnel?** (*maximum 300 words)*

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?

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

**Why is your organisation best placed to deliver this project?** (*maximum 300 words)*

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

**Describe a project on a similar scale delivered by your organisation.** (*maximum 300 words)*

What was the impact? What were the learnings?

**6. Project Beneficiaries**

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

⬜ General community ⬜ Indigenous ⬜ Migrants/refugees ⬜ People with a disability

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

⬜ Infants (0-5) ⬜ Children (6-12) ⬜ Adolescents (13-18) ⬜ Young Adults (19-24)

⬜ Adults (25-64) ⬜ Older Adults (65+)

Will your project have a specific **gender focus**? If your project does not focus on a specific gender, please select "No specific gender focus".

⬜ Females ⬜ Males ⬜ LGBTQI ⬜ Diverse gender/sexual identity

⬜ No specific gender focus

**Project Reach**

We are interested to know where the majority of direct beneficiaries for this project are located.

If your immediate project beneficiaries are not located in a specific Local Government Area/s (LGA), please select ‘Statewide’.

⬜ LGA Specific ⬜ Statewide

**LGA specific:** If you selected LGA Specific from the check box above, indicate from the list below the LGA/s where the majority of direct beneficiaries for this project are located. Find your LGA: <https://knowyourcouncil.vic.gov.au/councils>  
(For the purposes of this sample form, the full list of LGAs is not included.)

**7. Project Outcomes**

**Please note that should your application be successful, you will be required to report against your project's milestones and outcomes.** We recommend that you provide short, concise points in the following sections, and that you don't generalise. Provide specific facts and figures; for example: "This project will benefit five communities (detail where) and is expected to reach 5,000 direct beneficiaries", rather than "This project will benefit many communities".

**Annual Milestones**

Impact Grants are multi-year grants up to three years. Provide a timeline for the duration of your project, listing key annual milestones (deliverables that are completed) that correspond to the outputs you will deliver.

Ensure that your milestones align with your nominated project start and end dates. Example: YEAR 1 (1 March 2021 to 31 Dec 2021) - 30 May: Project Officer employed; 30 June: Partner MoU signed; July-Aug: workshops to be conducted with total 150 participants; Evaluation to commence; ...YEAR 2 (1 Jan 2022 to 31 Dec 2022): further 30 workshops conducted with 230 participants; June 30: initial evaluation report complete; ….

If your application is successful, you will be required to report against your project milestones each year. A satisfactory Progress Report is required before the next payment is released, so be realistic in determining your timeframe.

**Year 1 Milestones:**

**Year 2 Milestones:**

**Year 3 Milestones:**

**Briefly list the expected OUTCOMES of your project.**

Outcomes are the expected benefits or other positive changes that occur as the result of the outputs. Outcomes can be SHORT or MID-TERM RESULTS and define changes in knowledge, actions and conditions directly attributed to the activity. They may not be seen immediately at the end of the project activity, or within the period of a grant. Ensure outcomes are SMART - Specific, Measurable, Achievable, Relevant and Time-bound. Example 1: 50% of case workers incorporate financial assessments and advice in case practice; Example 2: 20% growth in income from Trusts and Foundations year on year.

**How will you measure the outcomes of your project?**

Identify the proposed method/s, who will be undertaking the measurement and evaluation, over what time period you will track outcomes, and how you will use the results.

**What plans, if any, do you have to share the outcomes or disseminate the learnings of your**

**project?**

**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)*

**8. Project Budget**

**Budget Template**

You will need to provide details of income and expenditure for your multi-year project.

* [**Click here**](http://hmstrust.org.au/wp-content/uploads/2020/08/Multi-year-grant-project-Budget-template-FY21.xlsm) to download 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.

* Total project budget: $\_\_\_\_\_\_\_\_\_\_
* Total Amount requested: $\_\_\_\_\_\_\_\_\_\_ *(Value may not be less than $90,001.)*

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):

**9. Additional Information**

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

**10. Conditions and Attachments**

**HMSTrust Grant Conditions Form**

Download and read the [HMSTrust Standard Grant Conditions Form](http://hmstrust.org.au/wp-content/uploads/2020/05/Sample-Standard-Grant-Conditions-Form-May-2020.pdf) 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)

**11. 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 Organisation Representative name (CEO or equivalent; or Head of Advancement for university applicants):

Position: Date: