

# THE FLORA & FRANK LEITH CHARITABLE TRUST

February 2017

## GRANT APPLICATION FORM 2017

### Section A – Introduction

The Flora & Frank Leith Charitable Trust is an Anglican orientated trust that focuses on supporting projects and programs located in Victoria, aimed at helping the disadvantaged with a bias towards children, youth and families.

We prefer to fund programs that make a cost effective, demonstrable and sustainable difference for the better in the quality of life and access to opportunities for our targeted children, youth and families. Funding is only available for Victorian organisations.

The annual closing date for applications is **29 September**. Successful applicants will be notified by mail by **31 December** and unsuccessful applicants by **31 January**.

See **Section D** below for the term and conditions.

### Section B - Your Organisation

Name of Applicant

Name of Organisation

Associated organisations,  
e.g. Uniting Church

Postal address

Contact person (name and title)

Tel BH

Tel AH

Fax

Email

Chief Executive Officer or person in charge of organisation

Tel BH:

Tel AH:

Fax:

Email:

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### Section B - Your Organisation continued

Total income and breakdown of sources of funds:

- Government
- State/federal/local
- Fee for service
- Investments
- Own business activities
- Trusts
- Donations
- Any other source

Please insert another page (if necessary)

Total Budget of organisation	Amount requested for project
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Number of employees in organisation	
Full time	Part Time
Volunteer	

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<b>Supporting documentation</b>	
1. Copy of most recent annual report	
<input type="checkbox"/> Attached	<input type="checkbox"/> Not attached because:
2. Copy of current balance sheet and accounts	
<input type="checkbox"/> Attached	<input type="checkbox"/> Not attached because:
3. ABN(evidence)	
<input type="checkbox"/> Attached	<input type="checkbox"/> Not attached because:
4. GST registration (evidence)	
<input type="checkbox"/> Attached	<input type="checkbox"/> Not attached because:
5. Public benevolent institution (evidence)	
<input type="checkbox"/> Attached	<input type="checkbox"/> Not attached because:
6. Deductible Gift Recipient status (evidence)	
<input type="checkbox"/> Attached	<input type="checkbox"/> Not attached because:

## THE FLORA & FRANK LEITH CHARITABLE TRUST

### Section C - The Proposal

Name of project

Location

New Project

Existing Project, length of time:

1. Aims of project (No more than 100 words)

2. Activities of project (No more than 100 words)

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3. Who will benefit and how? (No more than 50 words)

4. Number of clients assisted per annum

5. Average contact hours per person

6. Record keeping activities (No more than 50 words)

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7. Methods of evaluation

How will you know you have been successful? (No more than 100 words)

8. Funds applied for from other sources (No more than 50 words)

9. Details of staffing for project (No more than 50 words)

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10. Brief budget (No more than 100 words)

11. Timelines (No more than 50 words)

12. Why you? What particular skills & experience do you bring?  
(No more than 100 words)

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### Section D - Term and conditions

#### Length of project

Generally the Trust funds projects that aim to be completed within **twelve** months from the date of the grant. If support is sought for a project of greater than twelve months, funding can be requested for a particular stage of the project. The anticipated completion date, of both the specified stage and the entire project, should be clearly outlined in the application.

The Trust will not fund the same project for more than three years.

#### Who can apply

An application can only be made by the organisation that will provide the service.

Grants may only be made to organisations which are not only Deductible Gift Recipients (under Subdivision 30-BA of the Income Tax Assessment Act 1997 (Cth)) but also deductible for Estate Duty (under Section 8 (5) of the Federal Estate Duty Assessment Act) and Probate Duty (under Section 21 of the Victorian Probate Duty Act) – even though no duty is now levied by those Acts.

An applicant which does not have the estate duty and probate duty exemptions but is a deductible gift recipient may in lieu of those two exemptions furnish a copy of its constitution so that the Trust may judge for itself whether it would have satisfied the criteria for estate duty and probate duty exemption.

Preference will be given to eligible Victorian service originations. Interstate or internationally based organisations are generally not funded.

Applicants may be contacted for more detail. All applications will be treated confidentially.

#### Purpose of Trust

The Trust exists to provide direct services to children and families for the relief of poverty and for the children's education and advancement in life.

#### What projects are not considered

Projects that **will not** be considered are:

1. Administrative;
2. Management;
3. Staff training; or
4. Research.

The Trust is unable to make distributions to **individuals** for relief, study, research or travel or any other purposes.

#### All Grants will be made subject to the following conditions:

1. The Grantee will use the whole of the grant exclusively for the Project described in the application for the grant and not for any other purpose.
2. The Grantee will use its best endeavour to complete the Project, or in the case of an on-going Project the stage of the Project to which the application specifically related, within twelve months from the date of receipt of the Grant (the "Specified Period").



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3. The Grantee will promptly advise the Trust of any material change which may affect the Grantee's ability to undertake or complete the Project within the Specified Period.
4. The Grantee will expend the grant only within the state of Victoria.
5. The Grantee will show the grant separately in its books of account and keep records adequately to enable the use of grant funds to be checked readily.
6. The Grantee is not required to acknowledge the assistance of the Trust in any published or displayed material relating to the Project.
7. The Grantee will provide the Trust with a Final Report no later than **15 December 2017**. **Applications for the 2018 grant will be considered ineligible without this final report.** The Final Report will include:
  - a. A brief description of the Project as submitted in the application;
  - b. A brief description of the Project at the time of the report;
  - c. A brief description of any changes which were made to the Project as described originally;
  - d. A brief outline of the reasons for any changes which were made to the Project;
  - e. A signed and dated statement of expenditure showing:
    - The amount received;
    - Details of the amounts expended on the Project;
    - The balance remaining at the date of the report.
8. The Grantee will allow authorised representative of the Trust to inspect the project during the life of the program.

### **Additional Information regarding the Trust**

Some examples of projects recently funded:

- Parent education for isolated teenage mothers
- respite care for disabled children
- aspects of accommodation for homeless young people
- help for migrant families

#### **A majority of grants are for between \$5,000 and \$10,000**

Some projects are funded for several 12 month periods but a new application must be made for each 12 months. No guarantee of funding in future years is given.

Approximately 80% of applications made in 2016 were successful.

This application form contains fields that allow a certain number of words. Please do not exceed the size of the fields as you will not be able to print any additional words.

**The use of this form (which must be printed and cannot be saved) is mandatory. Applications by email will not be accepted. Applications in any other format may not be considered.**

Please refrain from sending circulars or annual reports to our office unless they are attached to an application or final report.

## THE FLORA & FRANK LEITH CHARITABLE TRUST

### Section E - Our contact details

The Flora & Frank Leith Trust

Attention: Annette Esposito

C/- Tolhurst Druce & Emmerson

PO BOX 13348

LAW COURTS VIC 8010

Telephone 9670 0700      Facsimile 9670 8503

Email leithtrust@tde.com.au or aesposito@tde.com.au

Or the Trust Project Advisor Angela Were on 0417 360 453

It is preferred that the signatory of this application be CEO or equivalent.

Name of signatory:

Office held by signatory:

Date:

\_\_\_\_\_

Signature:

\_\_\_\_\_

### Section F - Checklist

**Applications will not be accepted by email.**

One copy of the application form posted to the Flora & Frank Leith Trust office address including supporting documents below:

1. Copy of most recent annual report
2. Current balance sheet and accounts
3. ABN evidence
4. GST registration evidence
5. Public benevolent institution evidence
6. Deductible gift recipient evidence