

FLORA & FRANK LEITH CHARITABLE TRUST

Edition February 2011

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OFFICE ONLY

AMOUNT APPLIED:

AMOUNT GRANTED:

Name of Applicant:

Section A – Introduction

The Leith 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.

The annual closing date for applications is 30 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 Organisation: [Redacted]
- Associated organisations, e.g. Uniting Church: [Redacted]
- Address: [Redacted]
- Contact person (name and title): [Redacted]
- Tel BH: [Redacted] Tel AH: [Redacted]
Fax: [Redacted] Email: [Redacted]
- Chief Executive Officer or person in charge of organisation: [Redacted]
[Redacted]
- Tel BH: [Redacted] Tel AH: [Redacted]
Fax: [Redacted] Email: [Redacted]

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Section B - Your Organisation (continued)

- Total income and breakdown of sources of funds (government, state/federal/local, fee for service, investment, own business activities, trusts etc)

- Number of Employees in organisation

Full Time:

Part Time:

Volunteer:

- Copy of current balance sheet and accounts:

Attached

Not attached because:

- ABN (evidence)

Attached

Not attached because:

- GST registration (evidence)

Attached

Not attached because:

- Public Benevolent Institution (evidence)

Attached

Not attached because:

- Deductible Gift Recipient status (evidence)

Attached

Not attached because:

Section C - The Proposal

- Name of project:
- Location:
 New Project Existing Project, length of time:
- Aims of Project:
- Activities of Project:
- Who will benefit and how?
- Numbers of clients/people assisted per annum:
- Average contact hours per person:

Section C - The Proposal (continued)

- Record keeping of activities:



- Methods of evaluation; how will you know you have been successful?



- Funds applied for from other sources:



- Details of staffing for project:



- The amount sought:



Section C - The Proposal (continued)

- Brief Budget:



- Time lines:



- Why you? What particular skills/experience do you bring:



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Section D - Terms and conditions

The Trust prefers 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. Major support is unlikely to be given by the Trust to a project for more than three years.

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) 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.

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

Applicants may be interviewed. All applications will be treated confidentially

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").
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 will 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 2012. Applications for the 2013 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:
 - i. The amount received;
 - ii. Details of the amounts expended on the Project;
 - iii. 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.

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Section E - Our contact details:

The Leith Trust

Attention: Ines Kallweit

C/- Tolhurst Druce & Emmerson

PO BOX 13348, LAW COURTS VIC 8010

Telephone 96 700 700 Fax: 9670 8503 email: leithtrust(at)tde(dot)com(dot)au

Or the Trust Project Advisor Angela Were on 9489 5751

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

Name of signatory:

Office held by signatory:

Date:

Signature:

Additional Information regarding the Trust

Some examples of projects recently funded:

- Group work with brothers and sisters of disabled children.
- 3 months live-in treatment for one young person in a drug and alcohol program
- Cost of a homework program for disadvantaged secondary students

An average grant is 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 55% of applications made in 2010 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 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.