

SUNSHINE FOUNDATION

GUIDELINES FOR THOSE MAKING GRANT APPLICATIONS

(Revised June 2008)

Applications that do not strictly comply with the Guidelines set out below will not be considered and will be returned to the applicant.

1. AREAS SUPPORTED

The Trustees will give attention to projects that seek to:

- a) Alleviate human suffering eg. address the problems of drug and alcohol abuse or the impact of diseases and natural disasters.
- b) Attend to matters of social need.
- c) Advance the frontiers of knowledge
- d) Enhance the quality of life (such as conservation and environmental projects, the performing and creative arts).

In the main, projects that are supported by voluntary labour or which are low cost tend to be favoured - as would projects that only require "seed" funding (viz. a small injection of funds which would enable a project to become self sufficient).

Projects with a demonstrable outcome have a greater chance of attracting a grant.

Only projects that are domiciled in Australia will be supported.

2. AREAS NOT SUPPORTED

Grants will not be made for travel purposes, such as academics travelling to conferences.

Applications for capital funds for building projects will receive low priority.

In the main, grants will not be made "Foundation to Foundation", or for reduction of debt or to cover a shortfall in operating budgets.

Projects whose budgets consist mainly of wages and or consultancy fees will be accorded low priority.

Likewise, projects that are designed to replace activities that are normally the responsibility of one or more of the tiers of Government will receive low priority. For example, funds to pay a teacher's salary, money to purchase a hospital bed will not be supported.

3. SCOPE OF SUPPORT

Projects seeking funds in the range \$500 - \$10,000 are more likely to be approved

4. UNIVERSITIES/COLLEGES/PUBLIC BODIES

The Chief Executive Officer or his/her delegate (eg. Vice Chancellor – Research) should endorse all applications and, where more than one such application is made from such a university/college/hospital, give an indication as to the priority that the organisation places upon the submission.

5. FORMAT FOR SUBMISSIONS

Submissions should be written in lay language terms and should not exceed two or three typed pages (excluding any attachments such as financial statements).

Submissions (which should be signed) must include the following:

1. Name and address of applicant organisation, and a contact person with a telephone number;
2. A brief outline, written in lay language, as to the nature of the project;
3. Expression of merit of the proposal in terms of its value to society (see "Areas Supported" on page one);
4. Details of costing for the project (preferably accompanied by audited statement or annual report of the applicant body). All prices quoted must **exclude** GST;
5. Statement of funds attracted to date and details of any government subsidy that may be available for this project;
6. Details of other current submissions to Trusts/Foundations;
7. **a)** All applicants are required to provide proof of their Australian Business Number ("ABN") issued by the Australian Taxation Office.
b) Applicants are required to demonstrate their "charitable status" and this is achieved by providing a **copy** of their "**Charity Tax Concession**" letter from the ATO (formerly known as "ITEC") **noting specifically that the applicant is a "charitable institution" and is endorsed as income tax exempt.** If the applicant does not have a copy of this new endorsement stating they are income tax exempt, then they must apply for a copy from the ATO to enable a submission to the Sunshine Foundation.
*Please note: A copy of the applicants "Endorsement as a Deductible Gift Recipient" (DGR) is **NOT** sufficient.*
c) If proof of an applicant's ABN **and** Charity Tax Concession is not provided, the application will be returned unprocessed;
8. The grant is not subject to GST providing that you agree to the attached "Standard Grant Conditions" which are prescribed in an ATO ruling. The Standard Grant Conditions (SGC) must be signed by an authorised person and attached to any application that is submitted. **Please Note: All applicants must supply a signed copy of the Standard Grant Condition's with their application. If the signed SGC is not supplied with the application, it will be returned unprocessed.**
9. **All applications** must include the completed check list page attached to these guidelines.
10. An indication as to how the outcome of the proposal will be evaluated.

6. NOTES

1. Applications (regardless of project type) cannot be submitted by the same applicant body more than once in any 12 months. Any exception to this must be negotiated in advance with the Secretary.
2. Unless specifically exempted at the time of the initial grant, bodies that do not submit a report to the Trustees at the completion of a project will not be considered for a grant for any subsequent project.
3. Grants are made twice per year (usually in March and September), and **applications close on 1 July and 15 December each year.**

4. All applications that are to be mailed should be addressed to:

The Secretary
Sunshine Foundation
C/- Mutual Trust Pty Ltd
P O Box 12
Collins Street West
MELBOURNE VIC 8007

Telephone Number: 03 9605 9500
Facsimile Number: 03 9605 9599

All applications that are to be couriered or hand delivered should be addressed to:

The Secretary
Sunshine Foundation
C/- Mutual Trust Pty Ltd
Level 33, 360 Collins Street
MELBOURNE VIC 3000

Faxed applications are **NOT** accepted.

Privacy Statement

"The Sunshine Foundation takes care to respect the privacy of all its grant seekers and only collects personal information by lawful and appropriate means. We ensure that we are not unreasonably intrusive when it comes to dealing with our applicants and only keep information that is necessary for what we do, ensuring that personal details are accurate, complete and up to date.

We only disclose certain personal information to external service providers, such as administrators, auditors and postal service providers.

We will always be open and transparent in our dealings with you. Should you so request, we will let you know what sort of personal information we hold about you, how we collect it and how we use it and disclose it. We will correct any information about you that you tell us is inaccurate, incomplete or out of date".

*The Trustees
Sunshine Foundation*

SUNSHINE FOUNDATION STANDARD GRANT CONDITIONS

The grant is not subject to GST providing that you agree to the following "Standard Grant Conditions" which are prescribed in an ATO ruling.

These conditions are that:

1. You will use the whole of the Grant exclusively for the Project as described in your application and not for any other purpose.
2. You will use your best endeavour to complete the Project within twelve months from the date of receipt of the Grant (the "Specified Period").
3. You will promptly advise the Sunshine Foundation of any material change that may affect your ability to undertake or complete the Project within the Specified Period.
4. You will expend the Grant only within Australia and where specified within the particular State or Territory.
5. You will show the Grant separately in your books of account and keep records adequate to enable the use of grant funds to be checked readily.
6. You will acknowledge the assistance of the Sunshine Foundation in any published or display material.
7. You will give the Sunshine Foundation a final report in lay language at the end of the Specified Period and, if the Project is completed after the Specified Period, within two months of completion of the Project. The Report will include:
 - a) The 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 outline of any changes that were made to the Project since it was described in your original application.
 - 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

Note: It should be possible to cover points 7a) to e) inclusive, in a total of one A4 page.

In order to satisfy the conditions for exemption from the GST, the Sunshine Foundation requires that you agree to the Standard Grant Conditions as outlined above, by signing and returning this agreement when your application is submitted.

Date:

Full Name:
(Please print)

Position:

Organisation:

Signature:

We agree to the "Special Grant Conditions" as outlined above.

SUNSHINE FOUNDATION – CHECK LIST (To be ticked & included in your submission)

1. Name and address of applicant organisation, and a contact person with a telephone number :

Contact detail

2. A brief outline, written in lay language, as to the nature of the project:

Outline of project

3. Expression of merit of the proposal in terms of its value to society (see "Areas Supported" on page one);

Merit of proposal

4. Details of costing for the project (preferably accompanied by audited statement or annual report of the applicant body). All prices quoted must **exclude** GST;

Project cost and detail

5. Statement of funds attracted to date and details of any government subsidy that may be available for this project;

Details of other funds available or requested

6. Details of other current submissions to Trusts/Foundations;

Details of other submissions

7. **a)** All applicants are required to provide proof of their Australian Business Number ("ABN") issued by the Australian Taxation Office.
b) Applicants are required to demonstrate their "charitable status" and this is achieved by providing a **copy** of their "**Charity Tax Concession**" letter from the ATO (formerly known as "ITEC") **noting specifically that the applicant is a "charitable institution" and is endorsed as income tax exempt**. If the applicant does not have a copy of this new endorsement stating they are income tax exempt, then they must apply for a copy from the ATO to enable a submission to the Sunshine Foundation.

*Please note: A copy of the applicants "Endorsement as a Deductible Gift Recipient" (DGR) is **NOT** sufficient.*

c) If proof of an applicant's ABN **and** Charity Tax Concession is not provided, the application will be returned unprocessed;

Proof of Income Tax Exemption and ABN

8. The grant is not subject to GST providing that you agree to the attached "Standard Grant Conditions" which are prescribed in an ATO ruling. The Standard Grant Conditions (SGC) must be signed by an authorised person and attached to any application that is submitted. **Please Note: All applicants must supply a signed copy of the Standard Grant Condition's with their application. If the signed SGC is not supplied with the application, it will be returned unprocessed.**

Signed Special Grants Conditions

9. **All applications** must include the completed check list page attached to these guidelines.

Completed Check List

10. An indication as to how the outcome of the proposal will be evaluated.

Evaluation process for project