

## Registration and funding guidelines 2009

### General Information

#### Eligibility

To be eligible for funding from all trusts and foundations that are managed by Perpetual, your organisation must be a charity or non-profit that has Tax-Concession status endorsed by the Australian Taxation Office.

Eligibility for funding from some charitable trusts and foundations is dependent on your organisation having deductible gift recipient (DGR) endorsement from the Australian Taxation Office.

Individuals are NOT eligible to apply.

Organisations wishing to apply for funding must complete the registration form.

#### Registering and applying for funding

1. Complete the registration form – organisations may register once only via our online form and are requested to advise Perpetual if any of their details change.
2. Complete the application for funding (optional) – if you wish to make a specific application for funds for 2009/2010, please fill in Part A and B of our online form. Part C may be filled out, only if applicable.

Only registrations and applications made using our online form (accessed at [www.perpetual.com.au/philanthropy](http://www.perpetual.com.au/philanthropy)) will be accepted.

#### Number of funding applications

Organisations may only submit one application for funding for the 2009/2010 period. (The majority of funding decisions are made by our Trustees between March and June each year.)

Universities and hospitals can submit one registration form and one application per department, up to a maximum of five funding applications.

National organisations can submit one registration form and one application from each state or territory branch.

#### Period of funding

Funding is generally provided for a one year period.

Multi-year funding will be considered subject to a satisfactory acquittal report and in most cases, a further application being made.

All funding applications are considered in the context of the period in which they are received.

#### Size of gifts

As a guide, gifts generally range between \$10,000 and \$100,000.

#### Opening and closing dates for registration and applications

The registration form will be available on our website from 5 January 2009 and can be completed at any time, there is no closing date for this form.

Applications for funding must be received by Friday 27 February 2009. Applications can be submitted from 5 January 2009.



Applications will be assessed as they are received however preference will not be given to early applications. Late applications will not be considered.

#### Activities funded

Perpetual's trusts and foundations recognise that for organisations to achieve their objectives, funds may need to be directed towards future general costs which are not necessarily project-specific. We will focus on the following criteria in our assessment of proposals:

#### Assessment criteria

1. Strategy. Evidence of strategic goals and objectives, as well as planning for monitoring, evaluation, and outcome-oriented measures. This also encompasses mission and the ability of the organisation to fulfil charitable objectives according to the terms of the founding document.
2. Outcomes. Evidence of realistic, measurable and achievable goals and outcomes, as well as societal impact.
3. Capability. The organisation's demonstrated ability to achieve its objectives. Evidence that the organisation has a sustainable business model by focussing on revenue and resources.
4. Leverage. Demonstration and willingness of the organisation to co-operate with other charitable and non-charitable organisations pursuing similar goals and the ability to leverage opportunities.

#### Focus areas

As a trustee it is our duty to ensure the funds from the charitable trusts and foundations we manage are distributed according to the terms of the founding document, eg a will or trust deed. In most cases, restrictions are placed on the trustee to provide funds:

- to a specific type of organisation
- for a specific cause or purpose
- to a specific geographical area.

You do not need to direct your application to a specific trust. As part of our assessment process, we will match your organisation to all appropriate trusts and foundations.

## Specific purposes

To meet the requirements of the trusts and foundations that we manage which have specific funding criteria, we seek applications for the following purposes in particular:

1. Aid and support for people with disabilities
2. Blind and vision impaired people
3. Animal welfare and the preservation of animal wildlife
4. Care, welfare and education of children
5. Education, early intervention and rehabilitation of disadvantaged young people
6. Medical research and advancement of medical science
7. Assistance for the homeless and families living in poverty
8. Support for the aged
9. Social and educational advancement of Tibetan Buddhism
10. Organisations working within the Jewish Community of Victoria

Charitable organisations that submit applications which fall outside these areas (for example in the arts and environmental sectors) are eligible for funding from trusts and foundations that support general charitable purposes.

## Regions

We invite applications from all states and territories in Australia. In addition, in order to meet the requirements of the trusts and foundations that we manage which have specific funding criteria, we seek applications focussed in the following geographic areas:

NSW: Gilgandra and Warren

Queensland: Toowoomba and Darling Downs, Northern Queensland

Victoria: Ballarat, Benalla, Geelong

Charitable organisations that operate outside these areas are eligible for funding from state-based and national trusts and foundations that are not restricted to a specific region.

## Perpetual's assessment process

### Assessment of your application

Please note that the following three points relate to your application for funding only and not to general registration.

1. Your proposal will be reviewed by Perpetual's Philanthropic Services team. You may be contacted to request more information about your application. Please do not attach any additional information as part of your application for funds unless you receive a specific request to do so.
2. Your proposal is then considered by the relevant committee or board of trustees.

3. If necessary, your application may also be assessed by an appropriately qualified person/panel to make a recommendation to the trustees.

## Notification

You will be notified of any funding outcomes by 30 June 2009. Please do not contact Perpetual before this time about the progress of your application.

Please ensure the email address on your registration form is correct.

## Successful applications

1. Gift recipients will receive details for the specific charitable trust(s) or foundation(s) that will provide funds to their organisation by mail.
2. While not a requirement or obligation, it is considered an appropriate courtesy to acknowledge the trust(s) or foundations(s) providing the gift in any publications or reports. If you would like to do this, please contact Perpetual Philanthropic Services.

## Activities not funded

We receive more funding requests from eligible organisations than there are funds available. Often trustees must decline applications even if they meet the stated criteria.

The following activities will not be considered for funding:

- deficit funding requests eg funding of past activities, loan repayments, operational deficits
- fundraising appeals.

## Terms

1. The decision of the trustees is final and is not subject to any appeal process.
2. Gifts to organisations will be given and must be used for the purpose stated in their application.
3. Organisations are required to complete an acquittal report and send it to the trustees within 12 months of receiving funding.
4. Multi-year funding will, in most cases, be dependent on a further application being submitted.
5. Perpetual considers the funding provided to organisations as gifts that are freely given and would not ordinarily constitute consideration for taxable supply by the recipient.
6. As a general rule, Perpetual does not intend to include the GST incurred by an organisation for the purchase of equipment or provision of services to the community in any gifts. It is presumed your organisation is registered for the GST and therefore you are able to reclaim this amount.

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This brochure was prepared by Perpetual Trustee Company Limited (PTCo) ABN 42 000 001 007, AFSL 236643. References to Perpetual, we or us are to Perpetual Limited (ABN 86 000 431 827) and its subsidiaries. All financial advice and trusteeship is provided by Perpetual Trustee Company Limited ABN 42 000 001 007, AFSL 236643 or its authorised representatives whose registered office address is Angel Place, Level 12, 123 Pitt Street, Sydney NSW 2000, Australia.

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## For further information

### Perpetual Philanthropic Services

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[www.perpetual.com.au](http://www.perpetual.com.au)