

# APPLYING FOR AN UNSOLICITED GRANT FROM THE RE ROSS TRUST:



## THE ROSS TRUST GRANTING GUIDELINES

### About The R E Ross Trust

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The R E Ross Trust is a perpetual charitable Trust established in 1970 in Victoria by the will of the late Roy Everard Ross. Since its inception, the Ross Trust has distributed over 70 million dollars in grants for charitable purposes in Victoria. The Ross Trust is governed by five Trustees who manage the Trust's assets and distribute its income. The granting priorities of the Ross Trust are set by the Trustees who take into account the wishes of the Trust's benefactor, Roy Everard Ross and are influenced by the changing needs of the community.

#### **The R E Ross Trust Statement of Commitment**

The Ross Trust will direct resources towards projects and other activities that:

1. Address disadvantage and inequity.
2. Encourage and promote community and individual health and wellbeing; and
3. Protect and preserve Australian flora and fauna.

More information about Roy Ross, the Ross Trust and its values, granting philosophy, its Trustees and staff are available from the Trust's web site at [www.rosstrust.org.au](http://www.rosstrust.org.au).

### The Ross Trust's approach to granting

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The Ross Trust accepts **unsolicited applications** for funding from community organisations throughout the year. Unsolicited applications would normally be considered by the Trustees at a scheduled meeting of the Ross Trust within eight weeks of an application being received.

To gain an appreciation for the breadth and scale of unsolicited applications that the Ross Trust has funded in the past, please review the Ross Trust's annual reports available at [http://www.rosstrust.org.au/about\\_activities.html](http://www.rosstrust.org.au/about_activities.html).

#### **Telephone assistance prior to submitting a written application**

Staff members are always happy to discuss a proposal before it is formally submitted or to answer any questions applicant organisations may have about the Ross Trust guidelines or application process.

A telephone call may save you going to the considerable effort of preparing an application that may not be eligible.

To speak to a member of staff, you can telephone the Ross Trust office on 03 9690 6255.

## Eligibility criteria

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- The Ross Trust can only provide grants to organisations either operating in Victoria or who will use the grant funds for the benefit of Victorians.
- The Ross Trust does not accept applications from or on behalf of individuals.
- To be eligible to apply organisations must have an ABN (Australian Business Number).

### **You do not need to be:**

- Incorporated (although the Ross Trust prefers that you are); or
- an organisation with Deductible Gift Recipient (DGR) status; or
- a Tax Concession Charity (TCC); or
- an Income Tax Exempt Fund (ITEF).

## Purposes for which the Trust will make grants

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There are three purposes for which a grant may be sought. An application may seek to achieve more than one purpose. The three purposes are:

- recurrent funding for general operations;
- funds for specific activities, services, projects and programs; and
- building and strengthening organisational capacity.

### **The Trust will not approve grants for the following purposes:**

- Capital fund raising for major building purchase, construction and maintenance works; including aged care accommodation.
- General fund raising appeals.
- Motor vehicles and buses.
- Purchases of major items of equipment.
- Support for organisations and activities which are too restrictive in their application to groups defined by religion or cultural origin.
- Personal benefit of nominated individuals.
- Sporting clubs or projects that promote sport for sports sake.
- Support for arts projects that are arts for arts sake; the Trust will fund arts initiatives that support public education or that facilitate the improvement of social outcomes.
- Provision of health and medical services; however, the Trust will consider supporting organisations that assist people severely disadvantaged in accessing the public health system and initiatives that support early intervention, prevention and health promotion.
- Scientific, including medical, research.
- Doctoral and post-doctoral research.
- Protection and welfare of domestic animals.
- Unsolicited applications for the purpose of emergency relief and material aid.

## Ross Trust granting priorities

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The Ross Trust's granting priorities are expressed in terms of the impact which the Trust aims to achieve. While your application to the Ross Trust may fit under several of the impact areas, it only needs to fit under **ONE**.

### IMPACT AREA A: IMPROVEMENT OF SOCIAL AND ECONOMIC OUTCOMES FOR THE MOST DISADVANTAGED AND VULNERABLE PEOPLE IN VICTORIA

The Trust's current priorities under this impact area are:

- those experiencing financial disadvantage;
- family violence;
- homelessness;
- people with cognitive impairment, mental illness and psychiatric disabilities;
- offenders, ex-offenders, those at risk of offending and their families;
- refugee and asylum seekers;
- those living in very small rural communities; and
- Indigenous Australians.

Applications seeking to improve the outcomes for indigenous Australians will only be accepted from:

- indigenous-controlled or managed organisations;
- an organisation working in collaboration with an indigenous-controlled or managed organisation; or
- an organisation with indigenous board members, staff or advisers.

During 2009-2010 the Trustees' will maintain their current commitment to the 17 organisations currently participating in the Emergency Relief and Material Aid program and **will not be accepting** any new unsolicited applications for the purpose of emergency relief and material aid under this Impact Area. .

### IMPACT AREA B: IMPROVEMENT OF OUTCOMES FOR CHILDREN IN THEIR EARLY YEARS

The early years covers the period from 0 years of age up to and including the first two years of primary school.

Applications should include evidence on which the proposal is based and show how many and in which ways, children will benefit as a direct result of the proposal.

## **IMPACT AREA C: IMPROVED ACCESS TO AND ACHIEVEMENT OF EQUITY AND EXCELLENCE IN PUBLIC EDUCATION**

The Ross Trust will accept applications under this impact area from:

- public institutions
- primary, secondary schools, universities; and
- community organisations.

Schools that meet the “public education” test for the purposes of the Ross Trust are those which:

- have a public curriculum
- share public values
- provide reasonable access for all students;
- are operated either by the government or independently
- receive public funding; and
- do not restrict access based on financial, religious or cultural limitations.

The Trust’s main priority under this impact area is on primary and secondary schooling although applications seeking to improve access and achievement of equity and excellence in tertiary education are not excluded.

Applications made under this impact area should include the evidence on which the proposal is based, show how equity and/or excellence in public education will be improved and demonstrate how students will benefit as a direct result from the proposal.

## **IMPACT AREA D: PROTECTION AND PRESERVATION OF AUSTRALIAN FLORA AND FAUNA**

The Ross Trust will consider applications under this impact area that:

- Are able to demonstrate the conservation value of the indigenous flora and/or fauna the proposal is seeking to protect.
- Show the biological and/or botanical evidence of how the proposal will contribute to the protection and preservation of indigenous flora and/or fauna.

If the proposal is to purchase land; the proposal must demonstrate;

- the high conservation values of the land.
- how the land will be managed in the future to protect those values.
- how the proposed action will contribute to a broader landscape scale approach.

It is unlikely that applications for environmental education submitted under this impact area will be successful.

## Size and length of periods of funding available

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Grants may be sought for periods of up to three years, and there are no maximum or minimum amounts for which grants may be sought. To gain an appreciation for the type and size of grants made by the Ross Trust, we suggest that you review the latest Ross Trust Annual Report available at [www.rosstrust.org.au](http://www.rosstrust.org.au) to gauge the mix of activity the Trust has funded in the past financial year.

## Payment of grants

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If successful, all grant payments made by the Ross Trust will be paid via Electronic Funds Transfer (EFT). The Trust will write to inform you of the outcome of your application, if you are successful we will request a Tax Invoice excluding GST and bank account details in order to make a direct deposit into your nominated bank account.

## Lodgement of applications and closing dates

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The Ross Trust has **no formal closing dates** for the submission of applications. The Trustees meet throughout the year and applications will usually be considered at a meeting of Trustees within six to eight weeks after an application has been received by the Trust.

All applications to the Ross Trust must be made on the **application form** available for download at [www.rosstrust.org.au](http://www.rosstrust.org.au) and can be supported by a covering letter of up to three pages summarising why the Ross Trust should support your application.

When submitting your application, please provide **seven (7) unbound copies** of the application and covering letter. Where possible we encourage the copies to be double sided.

Please note that only one copy of your organisation's latest Annual Report, audited financial statements, ATO documents and incorporation certificate need to be provided.

You may lodge your written application by **post or delivery to The R. E. Ross Trust, 7th Floor, 24 Albert Road, South Melbourne, Victoria 3205.**

The Trust will acknowledge **receipt of your application** in writing within 10 days of it being received. Applications received only via email **will not** be processed.

Please **do not provide** any additional materials, such as CDs or DVDs to support your application. Any material sent, without a direct request from the Trust will be disposed of.

## Factors taken into consideration by Trustees when deciding grants

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Irrespective of impact area or purpose, the Trustees take into consideration the following when deciding grants:

- the need;
- the number of people who will benefit;
- cost/effectiveness;
- the inclusion of a suitable method for assessing or evaluating success;
- potential future benefits;
- availability of alternative sources of funding; and
- the number of volunteers involved and the extent of their involvement.