

The Andrews Foundation

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Guidelines for Applicants

Background

The Foundation was established in June 1984, by Mr R. C. Andrews, the Chairman of the Pakenham Blue Metal Group of Companies. The Foundation was created so that Mr Andrews could benefit the community which has supported his business enterprises.

Grant Preferences

The Trust prefers to make Grants to communities of people who are helping themselves and others in ways that can be sustained into the future:

Projects which involve volunteers and where there are expectations and plans for the positive impact of the project to be sustained beyond the Grant period are preferred by the Trust.

The Trust is willing to join with other donors and sponsors to support projects.

The Trust gives priority to:

Projects which are designed to create and improve educational opportunities and training for students who are disadvantaged or with disabilities; develop, test and implement creative solutions to persistent, difficult social and environmental needs and problems – innovation is welcomed; requests for small Grants to enable smaller community organisations to begin or continue to make a positive difference in their communities; and requests for Grants from organisations that have a major involvement from volunteers in the community.

The Trust gives preference to Grants that benefit communities within the Gippsland region. The reason for this is the wish of Mr. Andrews to give back to the regional community where he grew up and made his wealth.

Priority is further given to applications supporting the following:

Aged Care/Health

For residential aged care, the Trust provides limited support for building works, capital fundraising and equipment. Grants are also made to hospitals for the purchase of necessary equipment.

Emergency Relief and Material Aid

The Trust supports a number of organisations which provide emergency relief and material aid. These organisations usually work in local communities within the Gippsland region.

Environmental Needs and Problems

The Trust supports selective projects for assisting in dealing with environmental needs and problems. These needs include rehabilitation of land and monitoring of land at risk.

Small Grants for Smaller Community Organisations

These Grants are aimed to help community organisations that are locally based to either get started or enhance an existing project. The Trust will look to significant contributions from volunteers and other community organisations when making a Grant.

Social Disadvantage, Needs and Problems

The Trust sees the need to assist organisations that work in the area of social disadvantage, needs and problems in order to help individuals and groups to find sustainable solutions to their issues. The Trust favours the targeting of such issues by locally based organisations. However, the Trust will not make Grants to pay for salaries.

Education

The Trust will accept Applications from kindergartens, schools (primary and secondary) for projects of building or equipment and innovative programs that will assist students. These programs must be locally based and be designed to benefit a substantial number of students.

Applications may also be made by universities and TAFE colleges for Grants for the purposes stated above.

Projects Not Funded:

The Andrews Foundation does not provide funds for:

- ❖ General Appeals
- ❖ Bursaries, study or travel costs
- ❖ Core funding of Organisations
- ❖ Recurrent costs of an established program
- ❖ The personal development of any one individual
- ❖ Sponsorship

The Decision Making Process

During the evaluation process, each application is noted for the following aspects:

- (1) Number of people in the community who will benefit.
- (2) The funds the applicant has raised from other sources for the project. Priority will be given to applications who have raised some funds.

The Trustees do not generally sponsor projects totally, but prefer to give grants as 'top up' funding to ensure a project comes to reality.

(3)

The applicant must fall within the Taxation Act definition of "public charitable". You must provide us with the documentation to show you qualify as being publicly charitable. This definition has fairly wide interpretation. Please note that just because your organisation may be exempt from payment of income tax does not mean you qualify as being "publicly charitable". Where there is any doubt you should submit sufficient information with your application to help us verify your eligibility. For your information Sub division 30(B) (formerly Sec. 78 (4) and (5)) of the Income Tax Assessment Act states certain institutions that the Australian Taxation Office (ATO) regards as being publicly charitable. If you have a certificate to this effect from the ATO or can obtain it then attach it to your application.

- (4) The availability of government grants to assist a project is considered advantageous.
- (5) The long term durable nature of the proposed project. In this regard the Trustees will not generally sponsor items which are recurrent by nature. For example, salaries for a worker on a long term project would not attract a grant.

Please note that as the Andrews Foundation is a charitable trust under the Taxation Act, it may be necessary for the Trustees to refer your application to the Taxation Department.

The Trustees have absolute discretion as to which applicants will receive a grant.

Procedure

Applications must be lodged on the official blue application form. Complete all questions and the cost summary. Further attachments may be included, but all information must initially be supplied on the official application form.

The following information must also be supplied:

- * Copy of Last Audited Financial Report
- * Copy of Constitution
- * Evidence of Tax Deductible Status
(refer to above note)

The closing date for applications is end of first week in March, June and November in each year. Applicants will be advised of the outcome approximately 6 weeks after the closing date.

Plan ahead. Don't leave it to the last minute. **Faxed copies and email will not be accepted**, even in lieu of the original being in the mail.

Enquiries and Website Information

Further advice is available from the Trustees through our office or visit our website at www.andrewsfoundation.org.au.

Applicants should understand that the limited funds of the Andrews Foundation will not allow all proposals of merit to be funded. Rejection of an application, therefore, need not mean that it was not well regarded by the Trustees.