

# Frankston Charitable Fund



FY 2023/24

## GRANT GUIDELINES

**One-off funding available to assist charitable organisations for programs and projects that works to improve quality of life by increasing life opportunities and social inclusion in Frankston City.**

### Grant Categories

Grant categories have been established to meet local community needs, improve community connectivity and build community capacity. There are four grant categories as follows:

<b>Aged and Disability</b> <ul style="list-style-type: none"><li>• Broad interests include:</li><li>• Social inclusion, health promotion and physical activity</li><li>• Access and equity</li></ul>	<b>Families and Young People</b> <ul style="list-style-type: none"><li>• Broad interests include:</li><li>• Prevention, early intervention and parenting support</li><li>• Charitable development and youth engagement</li></ul>	<b>Education, Employment and Learning</b> <ul style="list-style-type: none"><li>• Broad interests include:</li><li>• Lifelong learning and skill development</li><li>• Volunteering and Charitable education</li></ul>	<b>Health and Wellbeing (including welfare, emergency relief and housing)</b> <ul style="list-style-type: none"><li>• Broad interests include:</li><li>• Homelessness support and early intervention</li><li>• Welfare services and emergency relief</li><li>• Charitable development and social inclusion</li><li>• Animal Welfare</li></ul>
------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

### About the Frankston Charitable Fund

The Frankston Charitable Fund (Fund) was established as a sub-fund of the Lord Mayor's Charitable Foundation (LMCF) by Frankston City Council (Council) in November 2009.

The Fund aims to raise much-needed funds to assist charitable organisations that operate in the Frankston community by encouraging tax-deductible donations that build up the Fund corpus in perpetuity. Each year the Fund is allocated a grants budget which is then made available to eligible charities in the form of grants.

Governed by the Fund's Terms of Reference, the Frankston Charitable Fund Committee of Management (Committee) comprised of:

- Council's Mayor (or delegate)
- One other Council Councillor
- Director of Communities (or delegate)
- Three community representatives
- Delegate from the Lord Mayor's Charitable Foundation

### Funding

Grants made by the Fund will generally be between \$1,000 and \$10,000.

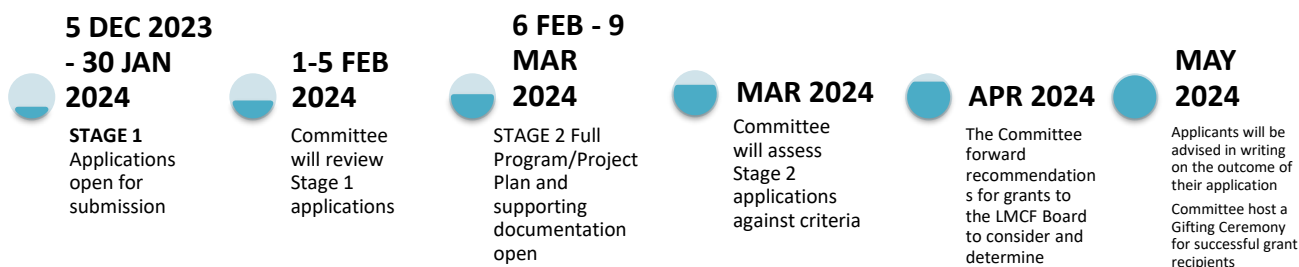
- The Committee can decide to
  - Fully fund
  - Partially fund
  - Make a contribution to a project on a "dollar for dollar" basis

### Key Principles

Key principles guiding the funding decisions are:

- Community strengthening through collaboration and partnerships
- Placed-based solutions to local issues
- Contribution to community capacity and sustainability
- Broad community impact and involvement
- Focus on prevention and early intervention

## Timeline



## Eligibility

Community group or organisations seeking funding must be:

- Endorsed as a
  - Deductible Gift Recipient (DGR) as covered by Item 1 of the table in section 3-15 of the Income Tax Assessment Act 1997; and
  - Tax Concession Charity (TCC)
- Providing a service / program within the Frankston Local Government Area

**Funding will not be considered for organisations, projects or programs that:**

- Do not meet the above stated eligibility criteria;
- Seeking funding for administration or operating costs (e.g. utility costs) that is more than 25% of the total program/project;
- Seeking funding for expenses, activities or programs that are the responsibility of another of Government (local, State or Federal);
- Seeking retrospective funding for projects that have already started or have been completed
- Conferences, events or fundraising;
- Capital or endowment funds;
- Clinical or medical research;
- Auspicing – the organisation applying must be the organisation undertaking the project or program and, or
- Have not previously complied with grant conditions (including unable to properly account for prior funds; have not spent funds for the agreed purpose; or have not returned a detailed acquittal form from previous years)

## Application / Assessment Process

### Stage 1 – Program / Project Brief

Stage 1 allows applicants to propose their idea against the grant eligibility criteria without the requirement to submit a full plan or supporting documentation. Stage 1 submission must be submitted via the SmartyGrants online portal no later than 30 January 2024.

Stage 1 applications include:

- **Eligibility Checklist**
- **Organisation information**
  - Name, address and contact details
  - Description of the organisation including establishment date and geographical areas of services
  - Australian Business Number
  - Contact persons and their details
- **Program / Project Brief**
  - Project/Program title
  - Estimate timeframe
  - Grant amount sought
  - Total budget amount
  - Description of the project/program and how it will be evaluated
  - Additional funding received

Stage 1 Applications will be reviewed by the Committee. Successful Stage 1 applicants will then be invited to apply for Stage 2. All applicants will be informed of the Committee's decision.

### Stage 2 Application – Full plan and supporting documentation

Stage 2 applications are automatically populated with information provided in the Stage 1 application. Full activity and supporting documentation application must be submitted via the SmartyGrants online portal no later than 9 March 2024

Stage 2 applications must include:

- **Organisation information**
  - Number of Frankston City residents Assisted (Last financial year or anticipated for this grant)
  - Proportion of Frankston City Residents represented in total service base
  - Number of volunteers
  - Working with Children information
  - Full details about additional funding received
- **Detailed activity plan including:**
  - Methodology and partnerships
  - Alignment with Frankston Charitable Fund Granting Principles
  - Addressing community need
  - Capacity and experience
  - Number of participants and target group/s
  - Evaluation method for measuring outcomes
  - Financial sustainability beyond funding
  - Budget – Itemising program/project cost
  - Risk Assessment
- **Supporting Documentation**
  - A copy of your endorsement as a Deductible Gift Recipient (DGR) Item 1 issued by the ATO
  - A copy of your ‘Notice of endorsement for Charity Tax Concessions’ issued by the ATO on or after 1 July 2005
  - Copy of your organisation’s most recent financial statements and annual report
  - Name and contact details for public officers of the organisation (if applicable)
  - *Optional* – Referee reports or letters of support

The Stage 2 Applications will be assessed to ensure they meet grant eligibility and grant criteria. This will include an Australian Charities and Not-for-Profit Commission (ACNC) search being carried out. Applications that meet grant eligibility and grant criteria are then reviewed by the Committee. Recommended recipients are then reviewed by the Lord Mayor’s Charitable Foundation board of directors for approval.

All Stage 2 applicants will be informed of the Committee’s decision in May 2024.

Successful applicants will be invited to the Gifting Ceremony event.

## Conditions

The Committee of Management:

- May contact or visit organisations to discuss their application to gain a better appreciation of the proposal;
- Reserves the right to meet grant recipient for the purpose of assessing grant or as part of an ongoing visitation program; and
- May use information from the ACNC website as part of the assessment process

Successful applicants will be required to:

- Enter into a funding agreement and submit an acquittal form within 12 months of receiving the grant through the LMCF. The Fund is a separate legal entity to Council and therefore operates with their governance requirements.
- Acknowledge the support of the Fund in any promotional material associated with the activity funded. Information and stories on the benefit of the grant are requested and these may, with permission, form the basis of further marketing of the Fund.

## Assessment Criteria

		Weighting
<b>Fund Objectives</b>	<p>The program/project:</p> <ul style="list-style-type: none"> <li>• Meets a local community need</li> <li>• Enhances community participation and access to resources</li> <li>• Addresses key issues in the community</li> <li>• Promotes the capacity of the local community to develop, implement and sustain solutions to issues</li> <li>• Places an emphasis on prevention and early intervention</li> </ul>	<b>30%</b>
<b>Outcomes</b>	<p>The program/project outcomes:</p> <ul style="list-style-type: none"> <li>• Results in direct and lasting benefits to the wider community</li> <li>• Contributes to long term solutions to problems and, or innovative solutions</li> <li>• Primarily benefits Frankston City residents</li> <li>• Generates benefits that meet an identified gap or enhance a current service</li> <li>• Demonstrates broad support from other key stakeholders</li> <li>• Contributes to the future sustainability of the area</li> <li>• Has no potential risks to the fund for funding this project</li> <li>• Has other financial partnerships other than the Fund and themselves</li> </ul>	<b>40%</b>
<b>Management</b>	<p>The application demonstrates a viable structure to accomplish the objectives.</p> <p>The program/project:</p> <ul style="list-style-type: none"> <li>• Can be successfully achieved within the stated date of commencement and completion</li> <li>• Can demonstrate sustainability without the need for recurrent funding from the fund</li> <li>• Is achievable with the resources requested</li> </ul>	<b>10%</b>
<b>Organisational Capacity and Experience</b>	<p>The governance of the organisation seeking funding is sufficiently established</p> <p>The individuals who will direct and manage the program/project are suitably qualified</p> <p>The organisation seeking funding has</p> <ul style="list-style-type: none"> <li>• Reputational credibility within the community</li> <li>• Has sound economic standing</li> </ul>	<b>20%</b>
<b>Important but not essential criterion is as follows:</b>		
<b>Applicant is based within Frankston Local Government Area</b>		<b>Value Add</b>
<b>Applicants who have not been funded through the Frankston Charitable Fund for two consecutive years immediately prior to the current application</b>		<b>Value Add</b>

## Where do I apply?

- Applications are accepted through SmartyGrants online portal <http://frankston.smartygrants.com.au>

### Note to Applicants

- Late applications will not be accepted
- Only one application can be lodged per organisation per financial year
- This is a competitive process and limited to the amount of funds available
- Regrettably, not all grant requests can be satisfied, however, the Fund seeks to provide a fair balance between applicants. Eligible organisations, whether successful or not, may submit an application each year.

## Support Available

Contact	Assistance with	Contact
Frankston City Council's Community Grants Officer	General enquiries and advice regarding Frankston Charitable Fund Annual Grant.	(03) 9784 1035 during business hours <a href="mailto:communitygrants@frankston.vic.gov.au">communitygrants@frankston.vic.gov.au</a>
SmartyGrants Support Team	Technical issues with SmartyGrants website	(03) 9320 6888 <a href="mailto:service@smartygrants.com.au">service@smartygrants.com.au</a>

## Glossary

<b>Acquittal</b>	<i>means</i> information provided by a grant recipient that ensures that funds have been administered responsibly and in line with conditions of the grant program
<b>ACNC</b>	<i>mean</i> Australian Charities and Not-for-Profit Commission
<b>ATO</b>	<i>means</i> Australian Taxation Office
<b>Charitable Organisation</b>	<i>means</i> endorsed as a Deductible Gift Recipient (DGR) as covered by Item 1 of the table in section 30.15 of the Income Tax Assessment 1997
<b>Community Organisation</b>	<i>means</i> an entity that carries out activities for a public purpose or an entity whose primary object is not directed at making a profit for distribution to shareholders or members
<b>Council</b>	<i>means</i> Frankston City Council
<b>Frankston Charitable Fund</b>	<i>means</i> Sub-fund of the Lord Mayor's Charitable Foundation
<b>Grant Guideline</b>	<i>means</i> a document that provides the applicant a guide on eligibility of the specific grant
<b>Grant</b>	<i>means</i> sum of money given to organisations or individuals with an expectation that the money will be used for an agreed and specified purpose
<b>Lord Mayors Charitable Foundation</b>	<i>means</i> the independent community foundation registered as Lord Mayor's Charitable Foundation
<b>Not-for-profit organisations</b>	<i>means</i> an organisations that does not operate for the profit or gain of its individual members