



*Transitioning from*



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## **OVERVIEW**

*Greater Shepparton Foundation is an exciting and innovative new philanthropic organisation with the bold aspiration of ‘No-one living with disadvantage in Greater Shepparton’.*

*Continuing and expanding on the sound success and community-driven work and programs of The Community Fund Goulburn Valley over the past 18 years, Greater Shepparton Foundation is a Public Benevolent Institution with a legal status of DGR1, allowing it to accept donations and apply them more directly to solving problems on the ground in Greater Shepparton.*

*Working collaboratively with the Fairley Foundation, Greater Shepparton City Council, service providers and other partners, and the local community, the Foundation aims to lead significant change focussing on community connectedness creating lasting impact.*

*A community-based board will oversee the independent place-based Foundation, drawing on local knowledge and expertise, with a focus on creating partnerships to connect the needs of the Greater Shepparton community with the resources and skills to provide benevolent relief to people in need and to tackle disadvantage.*

*Key priority areas initially, which were identified by community leaders and service providers at a summit in 2018, will be Parenting and Early Learning, Youth Unemployment and Underemployment, and addressing Discrimination and Lack of Inclusion.*

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## FUNDING GUIDELINES FOR GRANT APPLICATIONS 2019

**PLEASE READ THE GUIDELINES CAREFULLY TO ENSURE YOU ARE ELIGIBLE TO APPLY AND TO ASSIST YOU TO COMPLETE ALL SECTIONS OF THE APPLICATION PROCESS**

### 1. PRINCIPLES AND GUIDELINES FOR PROJECT FUNDING

#### General Principles

The purpose of Greater Shepparton Foundation's grants program is to support community based projects that address the Foundation's vision of 'No-one living in disadvantage in Greater Shepparton'. The Foundation holds a strong emphasis on evidence based solutions to community needs.

Greater Shepparton Foundation will only fund projects where the services are delivered within the Greater Shepparton region, are sustainable and can deliver effective outcomes.

Appropriate accountability requirements form part of all funding allocations.

### 2. FUNDING

Organisations which meet the funding criteria outlined below are eligible to apply for funding **of up to \$20,000** in the Greater Shepparton Foundation Mid-Year Grant Round.

#### Funding Criteria

Key areas where support will be considered include:

- Parenting & Early Learning
- General Community and Welfare Services
- Youth and Child Development Programs
- Crisis Support for Families and Children
- Projects addressing Discrimination & Inclusion
- Aged Care Programs
- Indigenous Programs
- Multicultural Programs
- Disability Services
- Youth Un-employment & Under-employment

Consideration of project funding will take into account:

- Evidence of demonstrated need;
- Transparency of financial reporting;
- The amount of funding available for distribution;
- Past, present and future demand for services;
- The degree of overlap and collaboration with other organisations;
- The ability of the organisation to successfully deliver a project.

Types of activities that will NOT be funded:

- Projects which do not have the purpose of relieving poverty or distress of people in need;
- Projects outside the Greater Shepparton community;
- Individuals.

All funding will be at the discretion of Greater Shepparton Foundation Board of Management.



### 3. PROCESS FOR APPLYING FOR PROJECT FUNDING

To apply for a project grant an organisation must:

- Comply with the eligibility criteria set out above
- Complete a **Project Funding Application Form**, which is available on the website [www.greatershepparton.foundation](http://www.greatershepparton.foundation)  
OR by emailing [info@greatershepparton.foundation](mailto:info@greatershepparton.foundation)  
OR by phoning (03) 5832 8223 Monday to Thursday
- Ensure an Application Form is lodged in writing by **5pm July 31, 2019**

### 4. FUNDING AGREEMENT

A Funding Agreement will be entered into for each approved project. The document outlines the funding conditions and partnership roles and responsibilities between Greater Shepparton Foundation and the organisation.

Sign off of the funding agreement indicates agreement with the mutual obligations as set out below:

#### 4.1 Funding and Service Provision

The agreement details approved funding, payment schedule and acquittal requirements for the specific purpose and project detailed in the application. All funds must be expended on the specific purpose and during the specified acquittal period as per the budget submitted in the funding application. Any variation needs to be submitted in writing to the CEO and approved by Greater Shepparton Foundation.

#### 4.2 Evaluation and Acquittal

Funded organisations are required to submit an **Evaluation and Acquittal Report** by the due date and include appropriate documentary evidence of:

- Service provision/project delivery
- Client and/or community outcomes
- Records of expenditure
- Additional supporting documentation as appropriate for the project



## 4. FUNDING AGREEMENT *(continued)*

### 4.3 Marketing and Branding

As per the funding agreement, organisations are urged to:

- Include Greater Shepparton Foundation logo and approved wording on any relevant promotional material.
- Display any signage provided by Greater Shepparton Foundation.
- Acknowledge Greater Shepparton Foundation as a funding partner via media releases, annual report, website and public occasions, where appropriate.
- Provide suitable “copy” or content for inclusion in Greater Shepparton Foundation promotional material, print and electronic media, where appropriate.
- Inform and invite Greater Shepparton Foundation to events, where appropriate.
- Inform Greater Shepparton Foundation prior to events, seeking in-kind assistance, fundraising or sponsorship support to avoid any conflict with Greater Shepparton Foundation events and fundraising.

### 4.4 Visiting and Other Support

Successful organisations are encouraged to promote their partnership with Greater Shepparton Foundation. The aim is to increase awareness of the work of Greater Shepparton Foundation within the community, thereby increasing the number of potential donors contributing to the funding pool.

Representatives of Greater Shepparton Foundation will contact or visit each project at least annually to provide a mutual opportunity for relationship building, promotion and to increase Board member knowledge of funded projects and programs.