



# Funding Guidelines & Grant Conditions

December 2009

## About the Trust

The John Villiers Trust is a perpetual Charitable Trust established under the Will of the late John (Jack) Villiers, who died on 11 July 2002.

We give grants to a variety of charitable organisations working in Queensland, Australia and particularly in Central, Northern and Outback Queensland, which seek to benefit and improve the lives of Queenslanders.

The Trustees resolved in May 2004 that grants during the early years of the Trust should mainly benefit eligible charitable organisations operating within Central Queensland, being where John Villiers lived for many years in both Rockhampton and Yeppoon, and where he supported many local charities during his lifetime. A secondary emphasis is for the benefit of eligible charities operating within Northern Queensland and Outback Queensland, where John Villiers worked for many years in the pastoral industry, and was supportive of charities in those regions.

## What We Fund

In his Will, John Villiers specified that the object of the grant recipient be “the relief of poverty for persons in necessitous circumstances, the advancement of education, or other purposes beneficial to the community and being strictly purposes of a public charitable nature”.

Applications for projects which qualify within these categories will be considered. Taxation Ruling TR 2005/21 (pages 53-65) provides helpful advice on the eligibility for the stated purposes and these pages can be downloaded from our website in PDF format.

The Trustees give priority consideration to:

- applications from organisations operating in rural and regional Queensland, particularly Central Queensland, having regard to the areas where John Villiers spent much of his life.

The following items will *not* be supported:

- projects outside of Queensland
- deficit funding
- recurrent administrative costs
- funding considered government responsibility
- applications made within 12 months of a previous grant being approved or before an existing staged grant is completed
- direct grants to individuals, including travel expenses, personal study or attendances at conferences



## How to

# Apply for a Grant

All applications we receive are given careful consideration. We are always happy to discuss your proposal with you prior to submission.

## Closing Dates

The trustees meet two times per year to consider requests.

Closing dates are:

- 15 March
- 15 October

Applications received after these dates will usually be considered at the next meeting.

## Applying for a Grant

All eligible applications we receive are given careful consideration. We are always happy to discuss your proposal prior to submission.

Please read through the guide below and make sure you include all requested information with your proposal to enable us to consider it fully.

Applications from a university or research institute must be submitted through their designated research or grants office.

### Step 1 – Does your project fit within our grant programs and priorities?

Please read through the list of what we fund and don't fund.

### Step 2 - Check your eligibility

Before preparing your submission make sure your organisation is eligible to apply to the Trust for a grant.

- Your organisation must be endorsed by the Australian Tax Office (ATO) as:
  - Income Tax Exempt; and
  - A Deductible Gift Recipient (DGR) under item 1 of the table in Subdivision 30-B of the Income Tax Assessment Act 1997.

(If the notice of endorsement as a DGR is according to "item 2 of the table in section 30-15 of the Income Tax Assessment Act 1997", then your organisation is NOT eligible to receive grants from The John Villiers Trust.)

If you have the required endorsement and are proceeding with your grant proposal, you will need to send us a copy of your letter from the ATO confirming your organisations' "Endorsement as a deductible gift recipient" with your application. To show this endorsement is still current, please visit the Government's ABN Lookup website at <http://www.abr.business.gov.au>, do a search on your organisation and print a copy for inclusion with your application. This printout will also confirm your tax concession status.

- Your organisation must conduct public charitable purposes in Queensland

If the Constitution of your organisation does not limit its operations to Queensland, we require written assurance that your organisation does not intend to apply any of our grant funds outside Queensland.

### **Step 3 – Prepare your full proposal**

Your proposal should include the following:

#### **a) Grant Application Summary form**

This form, which you can download from our website, provides key organisation, contact and request information to assist us to process your grant proposal. This form **MUST** be signed by the CEO, Chairperson or equivalent endorsing the request. Universities are required to obtain the endorsement from their respective Research Office or Vice-Chancellor.

#### **b) Specific Grant Request**

This section should include:

- a) a description of the project
- b) evidence showing a need for the request and its value ie. the context in which your request has been formulated, including any other similar programs or research, to support your application
- c) detailed budget showing other sources of income, your contribution, etc. Project and other costs submitted in support of the application must be exclusive of GST. Please note that grants made by the Trust are regarded as gifts for the purposes of GST legislation and therefore not subject to GST (refer ATO GST Ruling 2000/11). Any GST components of a grant project will be paid by the Grantee, and then claimed back from the Australian Taxation Office on its next BAS return.
- d) a listing of major partners in the project and their roles/responsibility
- e) timeline of the project
- f) anticipated evaluation methods.

### c) Attachments

This section should include:

- a) a copy of your DGR endorsement notice (see Step 2 - Eligibility)
- b) a recent printout from the ABR website showing your DGR endorsement is current and confirming your tax concession status (also see Step 2 – Eligibility)
- c) a copy of your latest Annual Report including audited annual accounts
- d) any letters of endorsement supporting the project and/or your organisation are encouraged.

## Step 4 – Submit your proposal

Before mailing your request to us, please check back over the list above and ensure you have provided all the items and information we require.

Applications should:

- include all required material
- be clear and concise
- set the context
- demonstrate that projects are sustainable beyond the application/pilot.

If you have any queries, please do not hesitate to contact us. We prefer to discuss your application with you beforehand, rather than receive an incomplete or underdeveloped proposal.

Please mail **two copies** of your proposal to:

Mr Darvell M Hutchinson AM  
Chairman  
The John Villiers Trust  
Level 43  
80 Collins Street  
Melbourne Vic 3000

If you have any queries, please call (03) 9631 2502 or email [grants@jvtrust.org.au](mailto:grants@jvtrust.org.au)



## Standard Grant Conditions

To satisfy the provisions of the Will of the late John Villiers under which the constitution of this Trust has been established, together with the other interpreted regulations under which grants are exempt from the application of GST, the Trustees have determined that the following standard Conditions will apply to all Grants approved to Grantees:

1. The organisation must operate in Queensland, but if the Constitution does not specifically limit its operations or application of funds to Queensland, written assurance is required that the organisation does not intend to apply any of our grant funds outside Queensland.
2. The Grantee will use the whole of the grant exclusively for the project or purpose as described in the application and not for any other purpose without the prior written consent of the Trustees.
3. Project and other costs submitted in support of the application must be exclusive of GST.
4. Grants for major projects will only be paid by the Trust when all funding is in place and the projects has commenced, or as agreed if the Trust specifies that the Grant will be paid over a period of years.
5. The Grantee will use its best endeavours to complete a major project within twelve months from the date of receipt of the grant unless otherwise agreed.
6. The Grantee will promptly advise the Trust of any change that may affect the Grantee's ability to undertake or complete the project within twelve months.
7. The Grantee will maintain adequate records to enable the use of grant funds to be identified.
8. The Grantee will acknowledge the assistance of the Trust in any published or display material.
9. The Grantee will give a Final Evaluation Report of a project within two months of its completion. The report will include:
  - a brief description of the project and the progress and accomplishment or otherwise of the original project objectives
  - an outline of any changes made from the original application
  - a statement of income and expenditure for the project signed by a senior executive officer. It should show all amounts received, details of expenditure and any balance of the grant unspent.