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| **Gladstone Foundation**  **Grant Round 7 – October 2019**  **Expression of Interest Form 2019** |

**2019 Priorities and Criteria**

The Foundation has been established for specific purposes which are for the benefit of the Gladstone Region and all grants must solely be for:

* The relief of poverty.
* The relief of needs of the aged.
* The relief of sickness or distress.
* The advancement of religion.
* The advancement of education.
* The provision of childcare services on a not-for-profit basis.
* Other charitable purposes for the benefit of the Gladstone Region.

Because the Foundation is a charity, expressions of interest are encouraged from:

1. registered charities; and
2. from those who are not registered charities, however the Foundation asks that particular attention be applied to ensuring that any expression of interest will conform (solely) with the charitable purposes of the Trust.

**In order to be eligible for consideration, the initial expression of interest and subsequent applications must be:**

* + **from a registered charity, or**
  + **for a project that is for charitable purposes**
  + **preference is infrastructure and not service delivery; and**
  + **grants available between $250,000 and $500,000**

**Assessment:**

Applications will be evaluated by the Board of Advice on the following criteria:

* The extent to which the project will deliver the priority outcomes for the Gladstone community.
* The extent to which funds will be applied to provide a direct benefit for the Gladstone Region (and not directed to organisation capability and resources such as salaries).
* Demonstration on how, to the greatest extent practicable, the funds will be spent in the Gladstone region.
* The extent to which the applicant has demonstrated the organisations ability to deliver on projects of similar size and / or scope through its resources and previous experience.
* The extent to which the applicant has demonstrated the financial viability and sustainability of the project and / or the organisation.
* The availability of funding available from alternative sources, and the level of funding already committed to the project from the organisation or alternate sources.
* Any other factors that the Board of Advice considers materially relevant to the application.

A shortlisted applicant will have an opportunity to present a ten-minute overview of their application with five minutes for questions during the Board of Advice meeting on 3rd February 2020

Prior to receipt of funding, organisations will be required to commit to a funding agreement. This agreement will stipulate the reporting and acquittal requirements for the funding.

All grants recommended by the Board of Advice require final approval by the Public Trust as Trustee of the Gladstone Foundation.

Final Public Trustee approval is subject to the execution of a Funding Agreement by the recipient entity.

The Funding Agreement requires the recipient entity to address compliance and governance aspects of the proposed project. The Funding Agreement address matters such as (but not limited to):

* scope of the project, ensuring project viability and sustainability;
* where appropriate, the necessary approvals and consent to undertake alteration, modification, construction or improvements to land under a lease agreement;
* provision of work plans and budgets clearly detailing expenditure of grant funds;
* provision of statements of financial performance, position and, cash flow, certified by the relevant authorised person of the recipient entity;
* and provision of accounts payable and relevant correspondence, providing project updates.

Please ensure that all questions are answered fully, the EOI form is duly executed and a copy of the organisation’s most recent financial statements are included.

Completed EOI forms must be received by email by no later than **5:00 pm on Friday 1 November 2019**. Physical submissions will not be considered.

**a. Applicant Details:**

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| **Name of Organisation** | **ABN** |
| **Postal Address** | **Telephone** |
| **Street Address** | **Facsimile** |
| **Contact Person** | **Telephone** |
| **Position** | **Email Address** |
| **Your organisation’s background / history** | |

**b. Eligibility**

Please indicate which best describes your proposal:

□ The applicant is a charity (as defined by the *Charities Act* 2013), or

□ The project is for the following charitable purpose:

□ the relief of poverty

□ the relief of the needs of the aged

□ the relief of sickness or distress

□ the advancement of religion

□ the advancement of education

□ the provision of child care services in a non-profit basis and

□ other purposes which are for the benefit of the Gladstone region which are charitable under s12 *Charities Act* 2013

***Expressions of Interest submitted without indicating their eligibility may not be considered by the Board of Advice.***

**c. Project**

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| **Project/Program name** |  | | |
| **Project description** |  | | |
| **Total budget for the project (GST inclusive)** | | | $ |
| **Amount requested from the Gladstone Foundation (GST inclusive)** | | | $ |
| **Details of funds already committed to the project:** | | | |
| **Source** | | **Amount committed** | |
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| **Details of unsuccessful applications for funding the project:** | | | |
| **Source** | | **Amount committed** | |
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**d. Assessment Criteria for shortlisting:**

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| **1. How will the project deliver the priority outcomes as set by the Board of Advice?** |  |
| **2. What portion of funds granted by the Gladstone Foundation (if any) will be applied to the direct delivery of the project?**  **What portion is required to build organisational capacity?** |  |
| **3. Does the organisation plan to spend the funds with suppliers and providers within from Gladstone Community?** |  |
| **4. Describe how the Organisation has successfully delivered similar projects in the past?** |  |
| **5. How does the organisation plan to meet any ongoing funding needs to maintain / continue / develop this project in the future?** |  |
| **Please include a copy of the most recent annual financial statements for the organisation** | |

**e. Declaration:**

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| I,       (INSERT FULL NAME) am authorised by       (ORGANISATION NAME) to lodge this expression of interest on its behalf and warrant that all information provided in this EOI form is true and correct. I declare I have disclosed in my EOI form all funding requests and/or approvals sought from other sources for this project.  SIGNATURE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ DATE \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |