

## 2023 Grant Application Questions

To apply for a **Heritage Bank Charitable Foundation Grant**, you'll need to complete and submit our **online application** form before **5pm on 29 September 2023 (AEST)**. Applications must be submitted online prior to this time to be eligible. Please read our funding guidelines at [heritagecharitablefoundation.org.au/apply/grant-guidelines](https://heritagecharitablefoundation.org.au/apply/grant-guidelines).

In this document you'll find the questions that are asked as part of our online application as well as an example application to assist you to prepare your answers in advance.

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### Eligibility Questions

The online application begins with a series standard eligibility questions. If your organisation answers *no/none of the above* to any of the below standard eligibility questions, you will not be eligible to proceed with an application in this grants round. We'd encourage you to check back next year for information on further grants rounds.

Is your organisation endorsed by the Australian Tax Office with Deductible Gift Recipient (DGR) status and covered by Item 1 of the table in section 30-15 of the Income Tax Assessment Act 1997 (Cth)? **YES/NO**

- Does your organisation have existing successful programs supporting one or more of the following areas? (Select all that apply)
  - Positive educational and alternative pathways to help at-risk children and teenagers.
  - Health care services for vulnerable Australians and their families.
  - Support for the economic and social wellbeing of people in regional, rural and remote communities, including in times of natural disasters.
  - None of the above
- The funding request is for a program that operates within the geographical footprint of the Heritage and People's Choice Branch Network **YES/NO**
- Are you able to clearly demonstrate the number of people who will be positively impacted by provision of the grant? **YES/NO**
- Does your organisation have an annual income (based on your latest audited report) of under \$10 million? **YES/NO**
- Does your organisation obtain less than 70% of its annual income from government sources? **YES/NO**

## Grant Application Details

Please select the Grant you are applying for. The Heritage and People's Choice Grant is a standalone grant, whereas if you apply for the Our Shout Workplace Giving Grant you will also automatically register and be considered for a Growing Stronger Communities Grant.

- Heritage and People's Choice Grant 1 x \$50,000 Grant available** This Grant is only open to charities who offer supports people across the majority of the Heritage and People's Choice footprint working in one or more of our three focus areas:
  - Positive educational and alternative pathways to help at-risk children and teenagers;
  - Health care services for vulnerable Australians and their families; and
  - Support for the economic and social wellbeing of people in regional, rural and remote communities, including in times of natural disasters.
  
- Our Shout Workplace Giving Grant 1 x \$27,000 Grant available** This Grant is only open to charities who have a Core Program supporting: Health care services for vulnerable Australians and their families.
- Growing Stronger Communities Grants 4 x \$15,000 Grants available**

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What area of need will your Grant be used to address? (Select all that apply)

- Positive educational and alternative pathways to help at-risk children and teenagers
  - Health care services for vulnerable Australians and their families; and
  - Support for the economic and social wellbeing of people in regional, rural and remote communities, including in times of natural disasters.
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### Organisation Contact Details

- Organisation Name
- ABN
- Establishment Date
- Street Address Line 1
- Street Address Line 2
- City
- State
- Postal Code
- Country
- Full Postal Address (If different from above)
- Website URL
- CEO/Head of Organisation **First Name**
- CEO/Head of Organisation **Surname**
- CEO/Head of Organisation **Phone number**

### About you – Applicant Main Contact Details

- Your First Name
- Your Surname
- Your Role Title
- Your Email Address
- Your Mobile Number

### Organisations' Social Media Details

Please supply the web address or handle (i.e @heritagebankcharitablefoundation) for your social media accounts and the number of followers you currently have.

- LinkedIn Handle + number of followers
- Twitter + number of followers
- Instagram + number of followers
- Facebook + number of followers

## Administrative Details

The following information is for administration purposes and will not have any influence on whether your organisation receives a Heritage Bank Charitable Foundation Grant.

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What was the 2022/2023 annual turnover of your organisation?

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What is the number of full-time equivalent employees at your organisation?

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Does your organisation have volunteering opportunities? If yes please provide examples? (200 words or less)

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How did you hear about the Heritage Bank Charitable Foundation Grants?

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## Organisation Overview

Briefly outline what your organisation does.

- Purpose/mission (500 characters or less)
  - The CORE Programs/Support/Services your organisation delivers (500 words or less. Dot points preferred)
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Please provide some key details about the program that the **Heritage Bank Charitable Foundation Grant** would contribute towards, if your organisation is selected.

Program Name

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How long has the program been running?

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What geographical regions will your program occur in?

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How many people did the program reach in 2022/2023 financial year?

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Provide a summary of the proposed program.

*Dot points are preferred for the following answers.*

- Program overview (500 words or less)
  - What is the situation, issue or problem the program is trying to address? Why is the program required and why is it a priority? (200 words or less)
  - Target Beneficiaries (200 words or less)
  - Expected short term results (12 months) (200 words or less)
  - Ultimate goals (long term results) of the program for both the participants and the wider community (200 words or less)
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Please identify the risks of the program. (200 words or less. Dot points preferred)

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Have people with lived experience contributed to the development or are involved in the delivery of the program? If yes please explain how?. (200 words or less. Dot points preferred)

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Describe how the program is measured and evaluated. What impact has the program achieved? If possible, please provide evidence of its success. (200 words or less. Dot points preferred)

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Why is your organisation best suited to run this program? (200 words or less. Dot points preferred)

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What other organisations' do you collaborate with to deliver the program and how are they involved? If none, leave blank. (200 words or less.)

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What impact will receiving a Heritage Bank Charitable Foundation Grant have on the program? (200 words or less. Dot points preferred)

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## Financial Details

Please provide an itemised program budget explaining how the grant will be spent. Please include income sources, expenditure and in-kind contributions for the entire program. (200 words or less)

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If you do not receive this funding will the program proceed? **YES/NO**

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## Declaration and Acknowledgment

By ticking each line below and clicking next, you confirm agreement to these terms.

- I declare that the information given on this form is complete and correct and I have authority to submit this application on behalf of the above-named organisation.
- By submitting this request I understand and accept on behalf of the above-named organisation, the Heritage Bank Charitable Foundation Grant Guidelines.
- Heritage Bank, a trading name of Heritage and People's Choice Limited, may collect personal information so that it may administer the Heritage Bank Charitable Foundation Weis Community Grants program. If the information requested is not provided, the application for a grant may not be considered. Heritage Bank (in respect of the Heritage Bank Charitable Foundation) may disclose personal information to its related corporate bodies, agents or external service providers only for the purpose of administering the grants as outlined in the [Heritage Bank Charitable Foundation Privacy Policy](#).

**APPLICATION COMPLETE**

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