

## **Theodore and Isabella Wearne Charitable Trust Inc. Guidelines for Applications for Financial Assistance for Organisations**

The Theodore and Isabella Wearne Charitable Trust Inc. (**The Trust**) provides financial assistance to West Australians in need, particularly children and the elderly.

Please read these guidelines before you complete the Theodore and Isabella Wearne Charitable Trust Inc Financial Assistance Application Form for Organisations

**ONLY APPLICATIONS SUBMITTED THROUGH THE WEBSITE APPLICATION FORM WILL BE CONSIDERED. WRITTEN APPLICATIONS THAT ARE COMPLETED AND EMAILED WILL NOT BE CONSIDERED.**

### **Definition:**

**“Organisation”** means the organisation who will receive the benefit of a successful application.

### **What Organisations can get assistance for:**

Financial assistance may be provided for charitable purposes or programs within Western Australia that provide advancement, relief or benefit to:

- aged persons
- children in need
- other members of the community

Please note all donations will be nett GST

### **Financial assistance is not provided for:**

- Salaries or administrative costs
- Overseas travel
- General or cash donations
- Retrospective funding
- Causes outside of Western Australia

### **How to Apply:**

- Applications must be submitted by the 1<sup>st</sup> business day of the month to be considered at that month's meeting. Late applications received after the first day of the month will be held over to the following month's meeting.
- **Applications received without all the required information will not be considered.**
- Applications must be made using *The Theodore and Isabella Wearne Charitable Trust Inc Application for Financial Assistance for Organisations* accessed via our website and be completed by an employee of the Organisation.
- The applicant must ensure that the application is filled in correctly to ensure consideration by The Trust.
- The organisation application form must be completed with the following information included or attached:
- Quotes, if applicable. For each item requested two (2) quotes per item are required and should be for items of similar description. The quotes must be less than three (3) months old

and include freight and installation charges, if applicable. Mitigating circumstances which prevent this may be considered by The Trust.

- All donations will be nett GST unless otherwise notified with reasons for including the GST
- Payment details for the Organisation must be included or the application will not be processed.
- Current financial information about the Organisation. Attach the most recent annual report for the Organisation.
- Government or private assistance documentation - evidence of other sources of funding sought both private and Government.
- Any other relevant information such as correspondence from other charities, government departments.

#### **What happens next?**

- The Trust meets each month to consider applications for assistance.
- The distribution of The Trust's available income is at the sole discretion of The Trust and its decisions are final. No correspondence or discussion will be entered into relating to those decisions.
- All applicants will be notified by email regarding the outcome of their application. Grant funding will expire six (6) months after the date of notification unless staged funding has been approved by The Trust.

#### **Once a grant is approved:**

- Funds will be paid directly to the Organisation.
- The funds granted by The Trust cannot be used for any other purpose or item, without the prior consent of The Trust.
- If the equipment granted is no longer required or suitable, prior to being purchased, the grant must be withdrawn, and a new application may be submitted immediately for consideration at the next Board meeting.
- Receipts must be provided to The Trust within **30** days after financial assistance has been provided.

#### **How often can I apply for assistance?**

- An Organisation can only make one application for assistance in any twelve (12) month period.
- Where an Organisation's application for assistance is successful, that Organisation cannot apply for another grant for a fixed period of twelve (12) months from the date of the successful grant being made.
- Where an organisation's application for assistance is not successful that application cannot be made again at any time, but that Organisation may apply for something different after the expiry of twelve (12) months from the date of refusal of the unsuccessful application.

#### **Role of the Organisation:**

The Organisation making the application must:

- Ensure when the grant is made it is promptly used for the purpose for which it has been given
- Provide The Trust with a receipt within 30 days after financial assistance has been provided. It is a requirement of the Wearne Trust's auditors that these receipts be obtained. **Failure to do so may result in future applications not being considered.**

**The Organisation or its employees must not contact The Trust to find out if an application has or has not been successful. The Organisation will be advised of outcome by email in due course.**

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