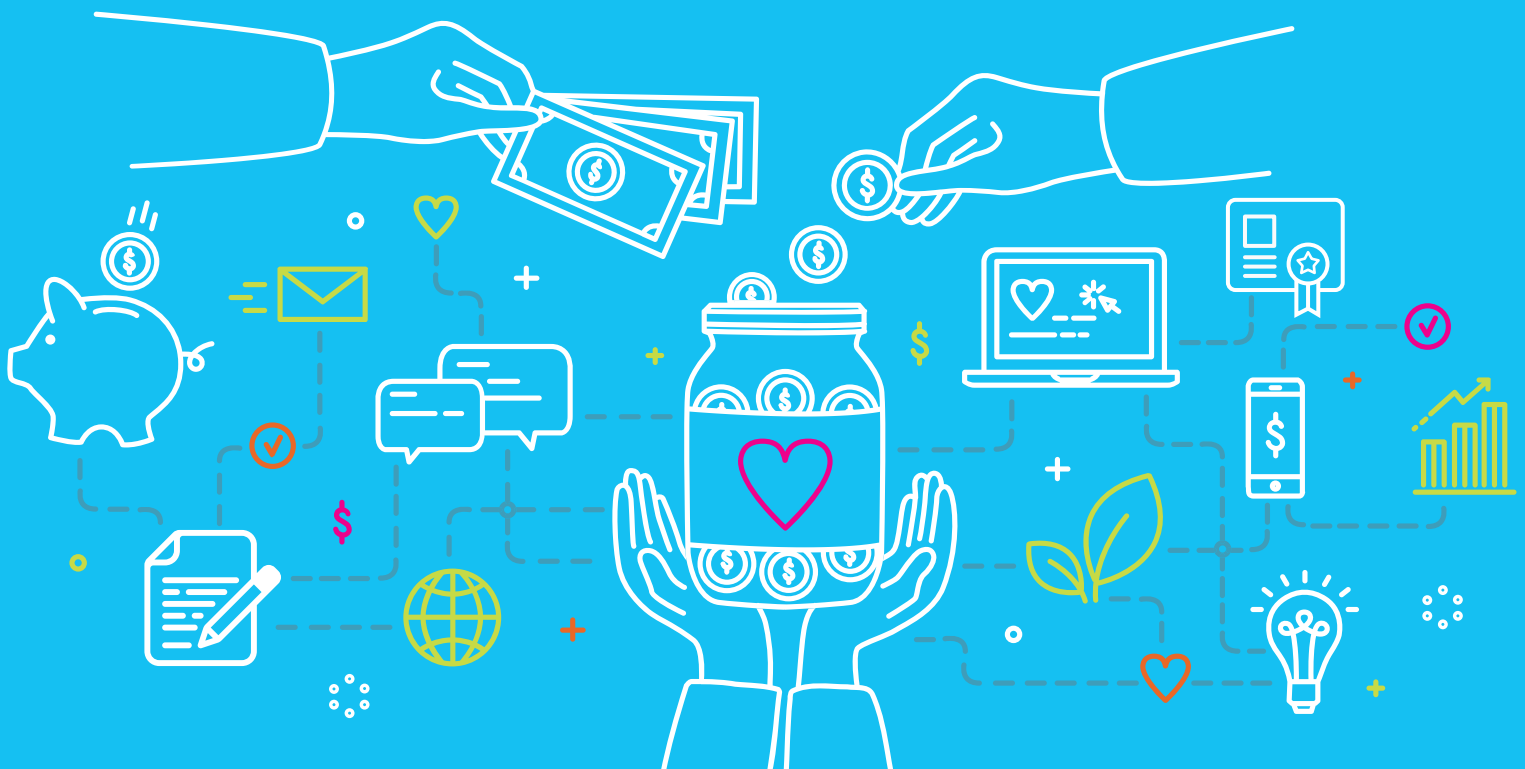


FUNDRAISING GUIDE

FOR COMMUNITY GROUPS, CLUBS AND
ORGANISATIONS IN SOUTH WEST VICTORIA

THINK GLOBAL. ACT LOCAL. **OCTOBER 2022**





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WELCOME TO THE FUNDRAISING GUIDE

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Your time and information have been invaluable in developing this Fundraising Guide. Thank you for your generosity of time and knowledge, which is now open to the broader local community.

DISCLAIMER

The original version of the guide was published in October 2022.

This is version #5, updated June 2024.

LGSC recommends that those using this fundraising guide validate the details via the references provided throughout the document.

ABOUT LEADERSHIP GREAT SOUTH COAST

Leadership Great South Coast Inc (LGSC) provides an annual community leadership program for aspiring and emerging leaders from all sectors of the Great South Coast region.

The LGSC Program builds relationships and networks between sectors allowing participants to benefit from a variety of perspectives when considering the nature of leadership and the future of our community and its economic prosperity.

A key aspect of the Program focuses on project management, engaging participants in a community project and the action learning cycle. Participants work together to develop a project to benefit communities within the Great South Coast, learning and putting into practice an array of project management skills through their community project.

The Leadership Great South Coast Fundraising Guide is an initiative of project team members: Daniel Pearson (Project Lead), Anna Sanderson, Jennifer Thomas, and Leesa ClausenBrown, in collaboration with community members.

The project team acknowledge and thank Hugh D. T. Williamson Foundation and Leadership Great South Coast for their support of the project.



**THE
HUGH D.T.
WILLIAMSON
FOUNDATION**





OVERVIEW

Fundraising is a key part of operating a for-purpose community organisation. Whether your organisation has a one-off need or something that's longer term, knowing the how and what can be difficult. This is especially true for resource-poor organisations.

The intended audience for this Fundraising Guide is community groups, clubs, and organisations in South West Victoria.

PURPOSE

This Fundraising Guide provides South West Victoria community organisations with the resources to develop and execute a fundraising campaign. The Guide covers ways to fundraise, who can fundraise in Victoria, and fundraising tools and templates.

WHY FUNDRAISE?

The core purpose of fundraising is to increase the resources available to support an organisation's purpose. However, there are many other benefits to fundraising, including:

- raising awareness of your organisation's cause,
- reaching a broader audience,
- building relationships with your community, and
- attracting volunteers and supporters.

Before you develop your fundraising plan, you need to understand why your organisation needs to raise funds. Consider the following questions, this will become the driver of your story.

- ✓ Who are we?
- ✓ What do we do?
- ✓ Why do we do it?
- ✓ Why do we need to fundraise?
- ✓ What are the funds for?
- ✓ What will happen if we don't fundraise?

WAYS TO FUNDRAISE?

There are multiple, easy ways to raise funds and resources. Developing a fundraising plan will help your organisation document how the fundraising campaign will deliver the desired outcome, including the activities and tactics it will employ to support the fundraising campaign.

A well-rounded campaign should consider using a combination of the following ways to fundraise, considering how each fundraising method complements the other.

Note: the following contents have been developed by researching previous fundraising campaigns, online resources, and discussions with our community mentors.

GRANTS

Grants are typically used to describe funding linked to short-term project funding or the one-off provision of money. Organisations that provide grants or funding to not-for-profits (grant-makers) include:

- government bodies or statutory authorities (federal, state, or local)
- philanthropic or other grant-making organisations, and
- corporate bodies (businesses)

Grants are monetary funding for stand-alone projects with a beginning, end, and clear outcomes. They normally will not cover the ongoing running costs of an organisation. The funds do not have to be repaid, if the funds are used for the specific purpose outlined in the application.

Grants are usually highly competitive, and the grant writing process can be daunting as applications need to be detailed and specific and supported by relevant evidence-based documentation.

When completing a grant take your time, split it up into easy steps, and work through each step.

If completing the application online through a grant portal such as Smarty Grants, check if there is a save and return feature or a downloadable application template that allows you to draft the application offline. This enables you to work through all the requirements and ensure that you have the supporting documentation on hand.

Common information and documentation required for small as well as large grants are:

1. Organisations name and contact person
2. ABN or auspice organisations ABN
3. Financials (statements, audits, or bank details)
4. Budget including quotes
5. Plans
6. Photos and videos
7. Promotion opportunities

Top 10 grant writing tips

These tips have been adapted from the Grants Hub to include information from fundraising and grant experts from the South West Victoria community.

There is also a number of tools and templates available in the appendix.

1. Know why you need grant funding

Before you apply for any funding opportunity, you need to identify and understand the needs of your organisation and what the grant would be used to fund.

What is the specific need?

Identify the issue or the problem you are trying to address, the solution to the problem that you are proposing and what impact your concept or project will have. Knowing the why helps you look at the bigger picture.

This information is useful when drafting your grant application as it can reveal the likelihood of your project's success and identify if your concept is something already being covered.

2. Be proactive

Knowing about grant opportunities ahead of time gives you more time to prepare a high-quality grant application. The application process is not as daunting if you are proactive and organised.



TIP:

- Read and understand what the funding provider requires including the application format.
- Set yourself realistic timeframes for each requirement and start gathering your documentation ahead of time.

3. Are you eligible?

Each grant has a specific focus or theme such as youth engagement, development of the arts, sporting participation, business improvement and research, as well as other eligibility requirements grant recipients need to meet.

Do your research and find out the eligibility criteria before applying.

If you are still unsure if your application would be eligible after reviewing the application details, contact the grant organiser at the relevant funding body.

4. Rally community support

The value of your application increases significantly with the inclusion of community support, statistics, and evidence. Some grants will ask for letters of support.

The more people who back what you are doing, the better. Connecting with your community to show how the project or idea will benefit the community will help generate their support.

Think about teaming up with established organisations who may endorse your application. Link your project to the strategic objectives of your local council area or regional priorities. The more letters of support and evidence of partnership and collaboration the stronger your application becomes.



TIP:

Save your partners and supporters time by providing some dot points about your project that they can include in their letter of support.

5. Research the funding body

Increase your chances of success by understanding the driving forces of the funding and the causes they tend to support. Each funder has its own area of interest. Reflect this information in your application, use it to demonstrate how your project or idea aligns with their drivers.

Read the grant guidelines and ensure you are a great fit for the funding opportunity. Take the time to learn the language of the funder. Do they use specific terms and words in the funding guidelines and website? Reflect their language in the application and include the words used in the funding guidelines.

Researching the previous recipients of the grant you are applying for gives you examples of the information the funding body wants to see in your application.

6. Have a realistic concept

Your application needs to be achievable and clearly defined. Grant providers want to know the key objectives and deliverables of your project and how they will be measured.

Provide evidence in your application as to why your project or concept should receive funding over others. Use localised data to tell the story.

Prove that your concept is unique to your organisation or community and that someone else has not already pitched the same concept or delivered a similar project. This can sometimes be difficult in small communities where organisations are competing for the same funding and sometimes even the same outcomes.

If your concept, or something similar to it, has been delivered previously, don't let that stop you, if you believe, and have evidence there is still a need. Instead, do your research and use this to strengthen your case, to tell the story and to highlight how your concept is different. Back your claims and develop a compelling case as to why you require funding.

7. Set a clear budget

Grant providers want to see how the funds will benefit the community. A clear budget will highlight if your goal is achievable and how the funding will help. It is another opportunity to demonstrate that your project or idea is well-planned and feasible.

Your budget should be detailed, outlining everything that will be used in your projects, including:

- quotes such as venue hire or trades people.
- all sources of income such as in-kind contributions and donations, and
- ensure you match income and expenditure totals.

8. Write the proposal with life and passion

Your grant application needs to convince the grant providers that your concept is exciting and impactful. That it will make a change worthy of their funding.

Your goal is to develop a clear and concise application that communicates your project or idea effectively and passionately.

When writing your application put yourself in the shoes of a grant reviewer, who are passionate about the causes they support.



TIP:

- Be passionate and enthusiastic to help drive points home and make it stand out amongst other applications.
- Be clear and concise using up-to date data, with clear language to support your idea. Follow complex points with a sentence that sums up the big picture.

9. Revise, revise again, and revise with friends

Spelling or grammar errors, waffling sentences or vague ideas could hinder your overall application. A fresh set of eyes will help you address areas that may have been left out or unclear. Take on board feedback and rewrite, if necessary.

10. Submit ahead of time

Grant writing takes time, perseverance, and dedication.

Do not leave your submission to the last minute. Submitting early conveys that your organisation is prepared. You will also have time to fix any unexpected errors along the way and avoid any last-minute hiccups that may prevent you from submitting a high-quality application.

DONATIONS

Donations are gifts received voluntarily without expecting anything in return. Smaller charity organisations often depend on donations for their income.

There is a significant amount of administration required for donations therefore it is recommended a dedicated person—either paid or volunteer—is appointed to plan and manage donations for your organisation.

The 3 types of donations

1. One-off donations

These are one-off donations of any size and tend to be for a one-off event or project.

2. Regular donations

Set up so that donations are received weekly, fortnightly, monthly, quarterly, or annually. This type of donation can be tied with workplace giving, which allows employees to donate to organisations from their pre-tax income.

3. Bequests and Wills

A sensitive but potentially important income stream. This is a long-term funding strategy not suitable for fulfilling a short-term initiative. It takes a lot of time to build

the relationships with the prospective donors and encourage them to become a benefactor for your organisation. Consideration should be given to the longevity of your organisation as it will need to be operating upon the passing of your benefactors.

Five easy tips to receive donations

These have been adapted from the Funding Centre to include information from fundraising and grant experts from the South West Victoria community.

1. Know your donors

Do your research and find the donors who are most likely to respond to your cause. This will be people who have been involved or donated with similar causes in the past or someone keen to make a difference. Find out as much as you can about the prospective large donors before approaching them.

2. Get your donors interested

Introduce them to the cause and use it to seize their interest. Use your research to build a rapport with them.

3. Get the right spokesperson

Choose someone in your organisation who is knowledgeable, trustworthy and if possible, choose someone with an existing relationship or common connection with the donor

4. Ask for the money directly

Don't beat around the bush. It is important to be clear about your ask and the impact the donations will make. Always make your request in person. Making your request via email or phone will almost never work.

5. Ask their friends

People donating to your cause are likely to have friends and acquaintances who are passionate about the same cause and interested in donating.

CROWDFUNDING

Crowdfunding is an increasingly popular method of online fundraising. It harnesses the power of social networks and the internet to raise funds.

The core principle behind crowdfunding is that you can help a friend or an entire community.

There are dozens of crowdfunding websites including but not limited to GoFundMe, Kickstarter, and My Cause. The Australian Charities and NFP Commission (ACNC) provides useful information about crowdfunding, charities, donors, and fundraisers.

Crowdfunding considerations

These have been adapted from the ACNC website to include information from fundraising and grant experts from the South West Victoria community.

1. Is crowdfunding for you?

Consider if this is an effective way to raise money as it may be a good option for some campaigns however crowdfunding is unlikely to be a long-term fundraising solution. It may not be appropriate for some projects and may not be appropriate for some organisations.

Does crowdfunding align with your organisational values?

Research crowdsourcing partners you plan to work with even if it is simply a website for fundraising. Donors are likely to associate your organisation with the crowdfunding website it uses. You need to be comfortable that the website reflects your organisation's values.

2. Read the fine print

Before signing up to a fundraising campaign through a crowdfunding website, make sure you understand the terms and conditions, which may include fees, eligibility criteria, rules about target amounts, project deadlines and the nature of some campaigns.

3. Know the law

Being aware of the legal requirements and ramifications of conducting a crowdfunding campaign is a part of running a well-governed charity and should be an important part of a fundraising planning. For more information about state and territory fundraising regulators and legislation, refer to the ACNC's Charity Fundraising page.

The Australian Taxation Office outlines four main types of crowdfunding; each using a different strategy to attract funding, and each may have different tax consequences for the parties involved.

4. Understand your responsibilities

One of the attractions of using a crowdfunding website is that it allows your organisation to outsource elements of its fundraising activities—for example the website takes care of some of the work of the fundraising campaign. However, the oversight and responsibility for fundraising can't be outsourced. Your organisation should ensure that any crowdfunding website they use is reputable, secure and complies with relevant Australian laws.

Other considerations include that any crowdfunding website you use meets your organisation and the community's expectations, of fair practice. It is important that using a crowdfunding website does not jeopardise your organisation's reputation.

If a member of the public wants to undertake a crowdfunding campaign for your organisation, you should consider having a policy that sets out basic ground rules and expected standards, including the circumstances under which the charity will not collaborate with someone on a crowdfunding initiative or distance itself from a campaign.

EVENTS

Fundraising events are a major source of income for many charitable organisations and community groups. As with donations, this way of fundraising takes a lot of time and energy to plan and deliver. However they can be profitable.

There are many different types of special events. Each has its own level of complexity and will call on different skills, experience, contacts, and capacities.

Some of the more common types of events are:

- **Functions:** Balls, trivia nights, concerts
- **Dinners:** In one venue, or progressive
- **Awards nights:** Particularly popular for sporting clubs and schools
- **Fetes and fairs:** A spring and autumn staple, particularly for schools
- **Grand openings and launches:** While they are usually more about publicity than fundraising, they can serve both purposes.
- **Record attempts and 'thons:** Walkathons, readathons, ride-a-thons, are popular fundraising methods for schools and other groups with a large supporter base.

Fundraising events top tips

These tips have been adapted from the Funding Centre to include information from fundraising and grant experts from the South West Victoria community.

1. Plan your event carefully

If there is a key ingredient to producing a successful special event, it is planning and time. Staging a successful fundraising event can attract positive publicity for your organisation and improve your reputation, which supports future fundraising efforts.

2. Make money

Your fundraising event is supposed to raise money, so it needs to raise money. A lot of effort into staging an event so make sure the income is greater than the cost as avoid losing money.

A successful event can boost morale with your volunteers and the goodwill of your members. An unsuccessful even will do the opposite.

3. Multiply your efforts

Use one event to employ multiple fundraising methods. For example, at a trivia night have a raffle and a membership sign-up table as well; if you are hosting an awards night charge for entry and sell drinks and nibbles.

4. Say thank you

Events give you the opportunity to recognise staff, volunteers, or supporters or to mark organisational successes or milestones.

EARNED INCOME

Almost every for-purpose organisation has several items or services it can exchange for revenue. Earned income or sale is a way to raise funds by selling what you know, what you do, or what you have.

There are several ways for organisations to raise funds such as a bake sale, craft fair, raffle tickets or sausage sizzle.

Tips for earning income

These tips have been adapted from the Funding Centre and include information from fundraising and grant experts from the South West Victoria community.

1. Get the goods

Figure out what your organisation is going to sell and the amount you intend to sell. For example, the local school will have a sausage sizzle at Bunnings and intends to sell 300 sausages over 2 days.

The Funding Centre has a simple event budget template that you can download to help develop your own budget.

2. Expand and diversify your market

The bigger the range the more you'll sell because the more you have to upsell. It's the age-old question: 'Do you want fries with that?'

Add-ons could be drinks and sweets; jams, relishes, and sauces; or coffee if you have a machine.

If this isn't your first food fundraiser, think of which food or product has been most successful in the past and make sure there's plenty of that type on offer.

3. Find a venue

Piggybacking on an established event such as election day or community market day is an easy way to sell your goods and raise funds. You will need to get permission from the event organisers to run your stall.

Each council has different regulations about whether you need a licence or permit to sell at an event or on the footpath.

Ask the venue if they will provide the space in-kind.

4. Get sponsored

Sponsorships with local businesses can help with the equipment to set up your stall, donate products that you can sell, or provide a venue in-kind.

5. Be safe

If you are selling food and drinks, know and follow the Australian Food Standards. You will also need to get the appropriate permit from your local council.

6. Tell people about it

Promote your event through word-of-mouth, newsletters, social media, posters, flyers, and any other method that suits your event, budget, and community.

If you are connecting in with an existing event such as a community market, there may be promotion opportunities through the event organisers.

7. Get a local celebrity to host

If you are lucky enough to know a local celebrity, ask them to volunteer on the day or to help promote through their social media accounts—for example they could do a couple of Instagram posts before and during the event—to raise the profile of your fundraiser. Chances are they would be happy to pitch in for an hour or so to boost their public profile.

8. Make a profit

You would be surprised at the number of fundraisers that fail to make a profit after accounting for expenses. It is up to you to decide how much to ask for the products you are selling, make sure you more than cover your costs. Think about how much of a markup you can add on certain products. For example, the addition of avocado to a sausage sizzle gives it instant gourmet status, and a gourmet price tag to match.

MEMBERSHIPS

A membership program can provide a handy source of regular, predictable, and renewable funds for your organisation. Membership programs are also about fostering a sense of belonging among your supporters. People's enthusiasm can be more beneficial to some organisations than money alone.

Consider the following:

- Do we want to make money, or do we want to grow numbers?
- What is our "value proposition"?
- Why would someone want to be a member of our organisation?

Membership program tips

These tips have been adapted from the Funding Centre to include information from fundraising and grant experts from the South West Victoria community.

1. Have your pitch ready and easy for anyone to use

Make the process as streamlined as possible so it is easy for people to join. Creating an elevator pitch that describes your organisation's purpose, which you can ask staff, volunteers and current members to use when recruiting new members.

2. Invite people to join

Draft an invitation for people to join through a personalised letter or email that addresses your prospective members. This should include information about:

- membership offers them,

- how they can help your organisation,
- the different levels of membership, if applicable,
- how to join - consider using a webform so people click and can join immediately or attach a sign-up form, and
- contact details - contact person, phone number and email address.

3. Follow up

Follow up a few weeks later in case people missed the first communication or need some extra encouragement to respond.

4. Go broader

Go broader, you can consider sending out a generalised invitation via a mass direct mail or email campaign. This kind of campaign is called a membership drive, this approach will also need to consider the Australian Spam Act 2003. The Australian Communications and Media Authority website provides helpful information on how to avoid sending spam.

Another way to broaden your membership base is to use your existing members, supporters and donors to champion the benefits of being a member of your organisation to their family and friend, and encourage them to join.

SPONSORSHIP

Sponsorships can be lucrative for a for-purpose organisation.

A sponsorship is a strategic business relationship, one which should be mutually beneficial. It is important to take a long-term view and make sure your organisation understands what your sponsor wants out of the relationship. There needs to be a commercial or reputational advantage for the business, such as raising their profile, improving their reputation, getting free advertising, or selling their products.

It is also important to know what your organisation needs from the sponsor. Is it financial or in-kind support such as free premises or products.

When you make a pitch to a potential sponsor, show them that you can make a difference to their bottom line. If you know what your organisation has to offer, you will be better equipped to work out what sort of businesses to approach for sponsorship.

Pitching for sponsorship

1. Pick someone your own size

It may seem logical to approach big business with a sponsorship proposal, after all they should have plenty of money, staff, and resources. Limiting yourself to seeking partnerships with big companies limits your options for securing a sponsorship. Businesses of all sizes are looking to form partnerships with for-purpose organisations.

Pitching for a partnership with local small or medium size businesses, gives you:

- **More choice:** there are more smaller and medium business than big business.
- **More flexibility and easier to approach:** approaching a small or medium-sized business for partnership may be less daunting than approaching a big company, particularly if it's your first time. Local business may already be familiar with you, your staff, and your organisation. It will also be easier to access them on an ongoing basis.
- **Better match:** smaller businesses are better placed to support a smaller organisation.

2. Positive publicity

Stories in the local media and positive word-of-mouth talk around the community can be generated through a local partnership

3. More grants

A locally based partnership may more easily attract grants or support from bodies like the local council who are keen to help a good local project, or from state government grant programs targeting community projects

4. Inspiration for others

A healthy partnership could inspire other groups in your town to join in or develop their own partnership.

WHO CAN FUNDRAISE IN VICTORIA?

Fundraising activity in Victoria is regulated by Consumer Affairs Victoria (CAV) and the Victorian Commission for Gambling and Liquor Regulation (VCGLR).

CAV regulates the majority of fundraising activities in Victoria and oversees the laws that govern fundraising across Victoria.

More information on organisations that are exempt from fundraising, visit the Consumer Affairs Website.

If you are targeting large donations or grants it is recommended that you are registered under the Australian Charities and Not-for-Profits Commission (ACNC) and have Deductible Gift Recipient Status (DGR) status. If your organisation or group don't have the resources to register to be a DGR or register with the ACNC, you can Auspice this out to a registered Charity or DGR.

AUSPICE ARRANGEMENTS

Auspice means to provide support, sponsorship, or guidance. When using an auspice arrangement, the relationship is often described as one where the auspicee (the smaller organisation) will be carrying out the project 'under the auspices of' the incorporated organisation, known as the auspisor.

It is the auspisor that receives the project funding and enters into relevant agreements for the auspicee.

An auspice agreement entered by the auspisor and the auspicee is a legally binding contract and sets out the legal obligations regarding the roles and funding relations between them. For more information refer to Justice Connect Not-for-Profit Law website.

ACNC REGISTRATION

The ACNC is the national regulator of charities. They register organisations as charities, help charities understand and meet their obligations and maintain a free searchable public register.

Registration can be completed online via the ACNC Charity Portal

The ACNC Self-Assessment tool for charities helps you through the process.

When registering with the ACNC it is important to get your legal structure right.

The most commonly used structures are:

- Incorporated structures
- Incorporated associations
- Companies limited by guarantee
- Indigenous corporations
- Unincorporated structures



For more details on the types of legal structures, visit NFP Law Website:

<https://www.nfplaw.org.au/free-resources/getting-started/legal-structure>

Sporting clubs are part of the community, but they are not considered charitable organisations and are ineligible for registration under ACNC. If your purpose is related to only the pursuit of sport, then you are unable to register.

DEDUCTIBLE GIFT RECIPIENT STATUS

DGR status allows organisations to receive donations that a donor can deduct from their income tax. To get DGR status an organisation must be either endorsed by the Australian Tax Office (ATO) or listed by name in the tax law, a list of names can be found on the ATO website.

If you are a charity, there are two ways to apply:

- ACNC registered: Apply for DGR status through the ATO DGR Application Form
- Not ACNC registered: Apply for DGR status as part of your ACNC Charity Registration

Top tip when applying for DGR

Avoid unnecessary delays when applying for DGR status by ensuring you have the following items in your governing document:

1. Is that the purpose of your organisation meets the charitable purpose test, and
2. Has the appropriate winding up/ revocation clause.

For example, if the organisation is wound up or its endorsement as a deductible gift recipient is revoked any surplus of the following assets shall be transferred to another organisation with similar objects. which is charitable at law, to which income tax deductible gifts can be made:

- gifts of money or property for the principal purpose of the organisation
- contributions made in relation to an eligible fundraising event held for the principal purpose of the organisation
- money received by the organisation because of such gifts and contributions.

FUNDRAISING TOOLS

DONOR DATABASE

Donor databases are the cornerstone of any smart fundraising strategy, a good database allows you to:

- increase your major gift revenue,
- develop long-lasting donor relationships,
- improve your outreach efforts and
- provide valuable analytics and insights.

A good database has information about your donors and conversations that you have had with them and notes any formal correspondence. It includes specific items including donations made, family information, likes, dislikes, hobbies, sporting teams and other items that break down barriers.

An example is that a CEO was meeting with a previous donor to request a donation for a new project. The donor database lists that they like trains, the CEO wore a train tie to the meeting, this struck up conversation and the donor committed to donating to the new project.

There are purpose-built programs available for donor databases, a basic format is provided in the Appendix 5.

This database needs to be confidential as donors may request to be anonymous.



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APPENDIX

APPENDIX 1 – SIMPLE GRANT SUBMISSION TEMPLATE

PROJECT NAME:	
NAME OF ORGANISATION:	
ADDRESS/PHONE/WEBSITE/SOCIALS:	
PRIMARY CONTACT: - Role in organisation	
PURPOSE:	
BRIEF PROJECT DESCRIPTION:	
BACKGROUND/CONTENT:	
EVIDENCE OF NEED: - Why does this project need to be done? - What is the problem?	
ACTIVITIES: - What is your idea to fix the problem? - What will the project achieve?	
OUTCOMES: - What does success look like? - How will you measure that? - Who are the beneficiaries?	
COST: - Funding sources - In-kind contributions - Confirmed or Unconfirmed	
NOTES: - Demonstrate capacity - Risks (reputational, financial, operational) - Key partners/stakeholders	

APPENDIX 2 – PRE GRANT-CHECKLIST

- Registered Organisation Name
- Statement of purpose
- Australian Business Number / Australian Company Number
- Tax status: (ITEC, PBI, DGR)
- Charitable status
- GST registration
- Bank details: (BSB, Account Name and Number)
- Incorporated Association Number
- Rules or Constitution
- Annual reports or finance reports
- Photos
- Years established
- Background and history
- Vision and mission
- Strategic or business plans
- Organisational structure
- Marketing information (eg. Branding guide, thank you letters, media releases)
- Physical address
- Postal address
- Phone number
- Email address
- Website
- Social media accounts
- Contact person and details (general)
- Contact person and details (media)
- Board or Committee Member details
- Permits required
- Letters of support
- Insurance information (eg. public liability, director, and officer insurance)
- Previous grants list
- Member list
- Testimonials from others (including Community and business partners, clients, and previous grant providers)

APPENDIX 3 – SOUTH WEST VICTORIA LIST OF TRUSTEES

TRUST	CONTACT DETAILS	DESCRIPTION
The A.L. Lane Foundation	<p>Address Sinclair Wilson 257 Timor Street Warrnambool 3280</p> <p>Email contact fmel@sinclairwilson.com.au</p> <p>Phone Contact 5564 0519</p>	The Foundation is a philanthropic trust dedicated to supporting, in the form of grants, worthwhile charitable, educational and community projects across the Warrnambool region.

TRUST	CONTACT DETAILS	DESCRIPTION
The Gwen and Edna Jones Foundation	<p>Address McLaren Hunt 199 Koroit Street Warrnambool 3280</p> <p>Email contact info@jonesfoundation.com.au</p> <p>Phone Contact (03) 5562 3544</p>	To fund projects and ideas of substance and innovation in the Western District of Victoria for the lasting improvement of the health, education, and general wellbeing of the community.

TRUST	CONTACT DETAILS	DESCRIPTION
The Ray and Joyce Uebergang Foundation	<p>Address McLaren Hunt 199 Koroit Street Warrnambool 3280</p> <p>Email contact info@uebergangfoundation.com.au</p> <p>Phone Contact (03) 5562 3544</p>	To advance one or more public scientific, public education or other public charitable purpose.

TRUST	CONTACT DETAILS	DESCRIPTION
<p>The Ern Hartley Foundation</p>	<p>Address Sinclair Wilson 257 Timor Street Warrnambool 3280</p> <p>Email contact phi@sinclairwilson.com.au</p>	<p>Each quarter we provided grants using the following guidelines:</p> <ol style="list-style-type: none"> 1. Warrnambool and District significance. 2. New initiatives particularly where more orthodox support is hampered by conditions. 3. Improve long term economic viability and development of the area. 4. Improve the lot of persons socially disadvantaged. 5. Preference given to grants to assist eligible charitable organisations carrying out projects of a permanent nature. 6. Rendering financial or other assistance to people in necessitous circumstances who by reason of poverty, hardship or misfortune are disadvantaged. 7. Grants for general maintenance of organisations, institutions, publications, public appeals, conferences, or travel may be made but are not preferred. 8. Assistance preference where "local contributions" are required to attract loaded ratio government funding. 9. Preference for projects which have a demonstrable income.

TRUST	CONTACT DETAILS	DESCRIPTION
Fletcher Jones Family Foundations	<p>Address Executive Officer Fletcher Jones Family Foundations</p> <p>Email contact eo@fjff.org.au</p>	To support community building initiatives in Greater Warrnambool and to uphold the legacy of Sir Fletcher Jones.

TRUST	CONTACT DETAILS	DESCRIPTION
The Ross Trust	<p>Address Ground Level, Suite 2 43 Agnes Street, East Melbourne 3002</p> <p>Email contact information@rosstrust.org.au</p>	<p>The trust addresses disadvantage, inequity and facilitate change by:</p> <ul style="list-style-type: none"> • delivering educational opportunities for vulnerable young Victorians, • enhancing biodiversity for the sustainability of Victoria's native flora, fauna, and ecosystems, and • maintaining the flexibility to respond to Victorians in crisis and work collaboratively to build the capacity of the philanthropic and social sector.

TRUST	CONTACT DETAILS	DESCRIPTION
Gall Family Trust	<p>Address Sinclair Wilson 257 Timor Street Warrnambool 3280</p> <p>Email contact dodo@sinclairwilson.com.au</p>	Our charity provides grants to local charities with gift deductible status.

TRUST	CONTACT DETAILS	DESCRIPTION
South West Community Foundation Main Fund	Address PO Box 478 Warrnambool 3280	Main Fund - covers the Southwest Region and has funded in the past- infrastructure, arts and culture and various other projects.
Koroit and District Fund	Email contact eo@southwestcommunityfoundation.org	Koroit and District Fund - focus on this region.
Colac Fund		Colac Fund - focus on this region.

TRUST	CONTACT DETAILS	DESCRIPTION
Thomas O'Toole Foundation	Address Sinclair Wilson 257 Timor Street Warrnambool 3280 Email contact fme1@sinclairwilson.com.au Phone Contact 5564 0519	The Foundation uses the income from our passive investments to provide grants to organisations across a broad range of services and projects, in the Warrnambool and surrounding district, for charitable purposes.

TRUST	CONTACT DETAILS	DESCRIPTION
Vedmore Foundation	Address Sinclair Wilson 257 Timor Street Warrnambool 3280 Email contact sdel@sinclairwilson.com.au Phone Contact 5564 0555	Addressing issues of disadvantage, educational, advancement and early years welfare

TRUST	CONTACT DETAILS	DESCRIPTION
William and Lindsay Brodie Foundation	<p>Address McLaren Hunt 199 Koroit Street Warrnambool 3280</p> <p>Email contact ccollins@mhfg.com.au</p>	<ul style="list-style-type: none"> • Promotion and encouragement of the education and scholarship of persons in need. • Improvement of the health and welfare of the incapacitated, the impoverished, the young and the aged. • Amelioration of the positions of disabled and disadvantaged children and their families. • Advancement of young people. • Establishment of facilities directed to any of the above purposes. • The advancement in the South Western district State of Victoria or wider in Australia of any one or more public scientific, public educational or other public charitable purpose as determined by the fund trustees.

TRUST	CONTACT DETAILS	DESCRIPTION
are-able foundation	<p>Address 52 Fairy Street, Warrnambool 3280</p> <p>Email marketing@areable.org.au</p> <p>Website www.areable.org.au/ foundation</p>	Supporting the communities where are-able operates to improve access and opportunity for people living with a disability

APPENDIX 4 – SOUTH WEST VICTORIA COMMUNITY GRANTS

LGA	ORGANISATION	NAME OF GRANT	LINK	FUNDING AMOUNT	GRANT DATES	WHAT MIGHT BE FUNDED?
Warrnambool	Warrnambool City Council	Community Development Fund	https://www.warrnambool.vic.gov.au/community-development-fund	Up to \$5000	June-July Yearly*	<ul style="list-style-type: none"> • Sport and Rec • Culture and Arts • Environment • Events
Moyne	Moyne Shire Council	Community Assistance Fund	https://www.moyne.vic.gov.au/Our-Community/Community-Grants/Community-Assistance-Fund	Up to \$5,000 \$5,000 - \$30,000 +	Aug-April Yearly*	<ul style="list-style-type: none"> • Equipment • Capital works • Community Strengthening
Southern Grampians	Southern Grampians Shire	Greater Grants	http://www.sthgrampians.vic.gov.au/grants	\$2,500-\$15,000	January - February Yearly*	<ul style="list-style-type: none"> • Arts and culture • Infrastructure • Community Strengthening • Environmental • Heritage • Tourism and Events
Glenelg	Glenelg Shire Council	Community Grants	https://www.glenelg.vic.gov.au/Our-Community/Grants/Community-Grants	\$1,000 - \$5,000	Twice yearly February and July*	<ul style="list-style-type: none"> • Recreation • Public Halls • Events • Heritage, Arts and Culture • Community Strengthening
South West	Southwest Community Foundation	Grants	https://www.southwest-community-foundation.org/grants	Up to \$5,000	March Yearly*	<ul style="list-style-type: none"> • Community Strengthening • Social Inclusion
South West	Wannon Water	The Ripple Effect	https://www.wannon-water.com.au/stronger-communities/grants	Up to \$5,000	April Yearly*	<ul style="list-style-type: none"> • Regional prosperity • Health and Wellbeing • Natural Environment

* Check website to confirm dates.



LEADERSHIP
Great South Coast Inc.

info@lgsc.org.au
www.lgsc.org.au