



LORD MAYOR'S CHARITABLE TRUST

2020 SEPTEMBER GRANT GUIDELINES

UP TO \$10,000

Further information may be obtained by contacting:

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Website: www.lmct.org.au

INTRODUCTION AND PURPOSE

The Lord Mayor's Charitable Trust (Trust) is an Ancillary Fund (and a Public Fund) within the meaning of the *Income Tax Assessment Act 1997* (Cth), established solely for the purpose of providing money, property or benefits to another fund, authority or institution which has been endorsed by the Australian Tax Office as a Deductible Gift Recipient. The Trust, as a public ancillary fund, is not able to provide funding to private or public ancillary funds as defined by the ATO (even if they have DGR status).

The purpose of the Trust is to support Brisbane's charities, by using the high-profile of the Trust to raise funds to be distributed to a range of worthy, lower-profile and generally under-funded charitable organisations within Brisbane. As outlined in the Trust Deed, the Specific Purposes of the Trust are:

- To attract and retain for the Trust the continuing interest and financial support of members of the public;
- To solicit donations, gifts, bequests and other forms of financial assistance;
- To widen knowledge and understanding among the public of the Trust, its activities, needs and objectives;
- To support organisations which do community work for the people of Brisbane; and
- To promote goodwill among the people of Brisbane and their relationship with the Lord Mayor and Brisbane City Council.

The Trust may from time to time initiate specific programs and causes to assist in the community. For the 2020 September grant round, the Lord Mayor's Charitable Trust will be giving priority to charities who have an immediate and emergent need due to the COVID-19 pandemic.

ELIGIBILITY

An organisation is eligible to apply for this grant if all of the following criteria are met.

- The organisation has been endorsed as a Deductible Gift Recipient in its own right or has been endorsed as a Deductible Gift Recipient in relation to a fund, authority or institution it operates.
- The organisation is an incorporated body with not for profit objectives.
- The objective of the organisation must be for charitable purposes.
- The organisation must have been established in Australia and operate in Australia;
- The organisation must use the grant for the endorsed purposes set out in their Deductible

Gift Recipient status and in accordance with their constitution.

- The organisation must be located or provides services within the Brisbane City Council local government area.
- The organisation must provide proof the organisation intends to provide the grant directly to clients residing within the Brisbane City Council local government area.

INELIGIBILITY

The following are ineligible applicants:

- Employees of the Brisbane City Council;
- Employees and relatives of the Lord Mayor and the LMCT Trustees; Government or semi-government organisations;
- Unions and student guilds;
- Professional associations; and
- Organisations registered as a company limited by shares.

Organisations, which are not eligible to apply for a grant in their own right, cannot apply for a grant through an eligible organisation. In the same way, an organisation cannot apply on behalf of another eligible organisation.

The following are ineligible applications:

- Capital funding for infrastructure building and improvements; and
- Salaries or wages and other operational costs of the organisation.

APPLICATIONS

Only one application from each organisation will be considered at a time. Organisations cannot submit multiple applications or submit an application in a subsequent round if a previous application is still valid for consideration by the Trust.

The application must be postmarked or e-mailed on or before grant closing date and time, as published on the Trust's website, otherwise the application will be deemed ineligible. Late applications will not be accepted.

ASSESSMENT OF APPLICATION

Trustees of the Trust will assess applications against the following criteria, whilst reserving their right as Trustees to exercise discretion in assessing all applications:

- Does this application fall within the priority areas for funding in this Trust cycle (ie. COVID-19 funding)?
- Does the organisation do charitable or good works for the community?
- Is the organisation funded elsewhere, and if so, by whom?
- Is the project one that will deliver genuine direct benefit to the community in relation to COVID-19?
- Is the charity located or does it provide services within the Brisbane City Council local government area?
- Will the grant be directly provided to clients residing within the Brisbane City Council local government area by the organisation?
- Does the organisation meet the ACNC threshold for small and medium charities (a total

annual revenue of below \$1 million)? Priority will be given to small and medium charities by ACNC definition.

The Trustees reserve the right to choose a particular cause to which it intends to direct part of its funds received. Applications may be prioritised according to the identified cause for that period, or, assessed against other applications received in that quarter on merit. Please note applications for amounts of \$10 000 (the threshold) or below will be considered more favourably than applications for funding exceeding this threshold.

APPLICATION PROCEDURE

Applications are to be submitted on the correct Trust application form with the following required supporting documents:

- Letter of Deductible Gift Recipient status;
- Most recent audited financial statements;
- Funding submission;
- Quotes/estimates for requested items; and
- Proof that the grant will be directly provided to clients residing within the Brisbane City Council local government area by the organisation.

Applications received by the Trust after the closing time and date and time of the grant round, as publicised on the Trust's website, and/or which do not have the required supporting documents attached will be deemed ineligible for a grant. By signing the application form the applicant agrees to abide by the Grant Conditions. Late applications will not be accepted.

OUTCOME OF APPLICATIONS

There are three outcomes for submitted applications:

- Approved (in full or part); or
- Deferred to next round; or
- Not approved.

Applicants will be notified by the Trust regarding the outcome of their application.

ACCOUNTABILITY

The recipient organisation will be required to complete an acquittal form (provided by the Trust) showing documentary evidence of the expenditure of the funds for the purpose for which the grant was provided within 3 months of grant receipt.

The Trust reserves the right, following acquittal, to request the return of unexpended funds or funds expended for a purpose other than for which the grant was provided.

ACKNOWLEDGEMENT OF TRUST

In any publicity made in relation to the grant from the Trust, the Trust requests that it be acknowledged as the donor of the funds. Further, where the organisation publishes an annual return, the Trust would appreciate recognition of its grant within that record. The Trust will assist in making the Trust logo available for marketing collateral to assist with the acknowledgment.