

Our guidelines

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A P P L Y F O R A G R A N T

Application form



Overview

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The IOOF group not only looks after the financial wellbeing of thousands of Australians but cares in other ways too, by supporting those Australians who are disadvantaged by health or circumstance.

The IOOF Foundation provides grants that support Australian not-for-profit organisations working with disadvantaged families, disadvantaged children and youth and aged care.

Program details

Who can apply?

To be eligible for funding from IOOF Foundation, your charitable organisation must have an Australian Taxation Office Deductible Gift Recipient (DGR) endorsement. Please ensure that your organisation has DGR status before submitting your application.

Funding amounts

The general grant program is for funding on average for \$30,000 per year for up to two years. Please ensure you provide as much budget information as possible to enable us to evaluate the grant amount requested against funds available to distribute. Whilst our initial general grants are on average \$30,000, we do have current grants ranging from \$10,000 - \$150,000 pa.

Geographical considerations

Grants will be considered for organisations represented and managing programs in any Australian State or Territory.

Assessment considerations

The Foundation considers applications from community organisations that are working towards providing measurable outcomes. Grant amounts are flexible and are dictated by the needs of the organisation and the funding availability.

- **Sustainable** will continue to have an impact and remain sustainable beyond our support.
- **Measured** outcomes and impacts are measured to show the progress of the

program.

- **Connect** have the ability to connect and share knowledge so that others may benefit.
 - **Impact** address an identified need and aim to deal with the cause of a problem.
 - **Involvement** would benefit from involvement from, IOOF staff e.g. volunteering, fundraising.
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Assessment criteria

Assessment criteria will be based on the governance of the organisation including the following:

- Need evidence of the need and value for money from the program.
 - Governance evidence of good corporate governance.
 - Outcomes evidence of realistic, measurable and achievable goals.
 - Leadership demonstration of ability to deliver and willingness share learnings.
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Funding exclusions

In general the IOOF Foundation will not support funding for the following:

- To or on behalf of individuals.
- Capital funds and building works.
- General fundraising appeals.
- Ongoing organisational operating expenses.
- Motor vehicles and buses.
- Government entities.
- Private schools.
- Overseas program.
- Other Foundations.
- Retrospective requests, general fundraising appeals or commercial

sponsorships.

- Organisations that are restrictive based on financial, religious or cultural origin.
 - Sport, recreation or social activities for their own sake.
 - One off activities such as camps and festivals.
 - Debt retirement, budget deficits, endowments or bequest program.
 - Travel, study or conferences.
 - Provision of health and medical services.
 - Projects which duplicate existing services.
 - Research except in special circumstances at the Board's discretion.
 - Protection and welfare of domestic animals.
 - Request that are identical to previously submitted, unsuccessful applications.
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Application process

If you are interested in applying for a grant from the IOOF Foundation, you will be required to submit an online application form. In most cases this form provides sufficient information to determine whether the request is one that can be progressed to a submission for Directors consideration. If required, we may request additional information such as:

- A copy of the latest annual report
- Audited financial statements
- Constitution including Objectives/Statement of Purposes

Important information

- In conducting due diligence and preparing requests for consideration by the Directors, IOOF Foundation will contact grant seekers to work through any concerns or questions and may also request meetings or site visits.
- We are grateful for grant seekers cooperation and patience and appreciate open communication throughout this process. Please note that it takes approximately three months for a decision to be made on enquiries that progress to a Directors submission.

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- Applications are considered on average twice a year by the IOOF Foundation Directors and grant seekers will be advised of the outcome via email.
 - The Foundation has finite funds and will not be able to support all applications, no matter how worthy. Rejection of an application does not mean that it is not well regarded. Some applications may be reconsidered at a future time (at the discretion and invitation of the Trustee Directors).
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Grantee obligations

Approved applications

Once a grant is approved, we request successful organisations to:

- Sign and return a grant agreement
 - Provide a tax invoice for payment
 - Provide a receipt of payment
 - Review the required reporting templates.
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Report templates

We asks grantees to provide a progress report at key stages of your project and a more detailed final report including expenditure statements at the end of the funding period. For multi-year grants, yearly progress reports, including expenditure statements, are also required. We will remind grantees when reports are due and provide a template to assist with the process.

Keeping in touch

We are interested in hearing from grantees about their achievements and challenges and relies on information sharing from recipient organisations to better understand what works and what doesn't, in what circumstances and why.

We invite grantees to stay in touch as it suits them and we will do the same.

Informing us about changes

It is important that grantees inform us of any significant changes that will have an impact on the work we are funding. We are mindful of the fact that circumstances can change and will seek to be flexible.


Acknowledgement and publicity

Grantees must acknowledge the support of the IOOF Foundation in any published material related to their project. Please provide the IOOF Foundation with a copy of the acknowledgement before finalising it wherever possible. We hope our grants will help recipient organisations to attract funds from other sources and are happy for our support to be mentioned to other funders or included in Annual Reports.

Important note

The Foundation has finite funds and will not be able to support all applications, no matter how worthy. Rejection of an application does not mean that it is not well regarded. Some applications may be reconsidered at a future time (at the discretion and invitation from the Foundation Manager).

More information

If you have any questions or would like more information please email enquiries@iooffoundation.org.au 



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