



CHARITABLE GROUP

APPLICATION GUIDELINES

Introduction

WA Charity Direct is a private charity that gifts 100% of the money it raises through member subscriptions.

The main objectives of WA Charity Direct are to make a real difference by helping Western Australian individuals in need that have limited capacity to help themselves, and to make giving easy.

WA Charity Direct has been approved by the Australian Taxation Office (ATO) as a public fund for the relief of persons in necessitous circumstances but assistance may be provided to any person in need.

Charities Assistance

Although WA Charity Direct's main aim is to assist individuals in need, our charter also allows us to partner with other registered charity organisations who deliver assistance to Western Australian individuals or communities that we consider to be in significant need.

To be considered for assistance from WA Charity Direct other charities should:

1. be registered as a charity,
2. be endorsed by the ATO as a charitable fund and have deductible gift recipient status,
3. be in need of funds for a particular purpose that relates to individuals or communities,
4. meet a fundamental community need,
5. demonstrate our contribution will make a material impact on the ultimate recipients,
6. usually not be a mainstream charity or have a geared up charity collection mechanism,
7. usually not receive a major part of your funding from Government bodies,
8. show why you cannot fund the need yourselves and what other measures you have taken to seek third party contribution to the funding (eg government bodies or other charitable institutions).

100% of WA Charity Direct's grant will be required to be applied directly to the purpose or project for which you are seeking funds.

Funding Pitch Days

WA Charity Direct aims to hold two funding pitch days each year, in May and November. This is an opportunity for charities to be invited to a meeting with trustees of WA Charity Direct to make a pitch for a funding grant. If you would like to apply for an invite to attend one of the funding pitch days, please contact us on info@wacharitydirect.com.au for further information.

All applications will be acknowledged on receipt. If you choose to apply for funding outside of these Funding Pitch Days your chances of success are significantly lower as we only have limited funds.

Application Procedure

If you believe that your charity meets all or most of the above mentioned criteria your charity can apply for assistance from WA Charity Direct.

In order for WA Charity Direct to meet its statutory obligations your application must include all of the following:

- Your Deductible Gift Recipient Status ("DGR") and/or Australian Charities and Not for Profits Commission ("ACNC") status
- Your charity's profile outline and objectives
- A copy of your deductible gift recipient registration



- Your last two years financial statements (profit and loss and balance sheet)
- The details of your last two years income and the sources of those funds (highlighting any Government funding)
- An outline of how your charity collects those funds
- Details of any crowd funding, including providing the link to the crowd funding site.
- Any other information about your charity that you deem relevant
- A statement as to why you are asking for funds from WA Charity Direct

Once received, an application may be accepted, deferred, (pending receipt of additional information) or rejected.

How much can we apply for?

There is currently no fixed amount that you can apply for. The maximum amount we will usually fund is \$20,000, however the majority of our approvals range from \$5,000 to \$15,000. As a guide you can view examples of how much WA Charity Direct has granted other charities on the WA Charity Direct website.

How often can I claim?

WA Charity Direct's main focus is on assisting individuals in need.

Generally, WA Charity Direct prefers other charities not become too reliant on any assistance it may give. However, where we select to partner with another charity who can deliver assistance to individuals or communities through a particular project or purpose, we may continue supporting that specific project or purpose for some years.

There is no guarantee that our funding will be repeated.

Verification of information provided and requests for further information

As the trustees' duties are quite onerous in respect to establishing the bona fides of each application and that applicants meet the criteria for assistance set out in the WA Charity Direct's Charter, verification of every application is essential to the process.

In almost all cases, applicants and third parties listed in the application will be contacted by telephone or email by one of the trustees to obtain further information or more detail on the information provided.

Please be prepared to answer questions of this nature when one of our trustees' calls.

If you feel uncomfortable in providing further information or evidence of your charity's position to support your claim, you may wish to reconsider requesting assistance from WA Charity Direct.

Any inconsistencies in the verification of the particulars set out in the application or the further independent checks carried out by our trustees usually leads to an unsuccessful application.

What happens if my application is successful?

If your application is successful an appointment will be made with WA Charity Direct to arrange receipt of the benefit and to organise promotional photos/material as outlined below.



Promotion and Information Sharing

Part of WA Charity Direct's charter is to continually advise its members of the outcome of successful applications and to promote the organisation to the community at large to increase our profile.

For successful applicants, WA Charity Direct may require photos, letters of appreciation and to use your charity's name, cause and project for promotional purposes and for distribution to our members. Details of your charity, cause and project may also be displayed on our website as a record of the organisations and people we have assisted.

An **agreement form** acknowledging the above is attached (appendix 1) and **must form part of your application.**

Who is on the Board of Trustees?

A Board of Trustees run WA Charity Direct. The Board comprises of: Peter Carter, Damien Eves, Jeff Miller, Simon Birkhead, Andy Brown, Ron Dwyer, Justin Manolikos, Scott Stanley, Simon Cherry, Karron Johnson, Pauline Eves, John Goodall, Brad Martyn, Tina Williams and Sandra Ursino.

The individuals act as trustees for WA Charity Direct in accordance with its Trust Deed. Applications for assistance are considered by the Board of Trustees.

About Us

WA Charity Direct is located in Perth, Western Australia.

WA CHARITY DIRECT is endorsed as a Deductible Gift Recipient (DGR) from **01 Apr 2005**. It is a public ancillary fund covered by Item 2 of the table in section 30-15 of the *Income Tax Assessment Act 1997* .

WA CHARITY DIRECT is a Charity endorsed to access income tax and GST tax concessions.

ABN: 19 537 867 585

E-mail: info@wacharitydirect.com.au



APPENDIX 1

APPLICANT AGREEMENT

(Must be attached to your application)

Please Initial

Further Direct Contact

I accept that a WA Charity Direct trustee will call me to obtain further information, or more details, or further supporting documentation in regard to my application and I agree that I will provide as much information or documentation as requested / necessary

Third Party Contact

I authorise WA Charity Direct to contact any third parties listed in this application to verify any information regarding my application

Consent to Information

I consent to this information being held by WA Charity Direct

Promotional Endorsement (If application is successful)

I authorise WA Charity Direct to use any of the information provided in my application for promotional purposes and / or for distribution to our members

I authorise WA Charity Direct to list details of my charity / case on their website.

I agree to provide a photo opportunity to WA Charity Direct at the time of the handover of the benefit.

Signature
Authorising all of the above

Date

Declaration of the Applicant

I certify that all of the information given in this application is, to the best of my knowledge and belief.

Signature

Date

Position in Charity