



CHARITABLE GROUPS

APPLICATION GUIDELINES

Introduction

WA Charity Direct is a private membership based charity that gifts 100% of the money that 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, to make giving easy and to gift 100% of the membership subscriptions we receive.

WA Charity Direct has been approved by the Australian Taxation Office (ATO) as a public fund that can:

1. Provide relief to persons in necessitous circumstances, or
2. Make donations to other charities that have Deductible Gift Recipient (DGR) status.

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 Western Australian individuals or communities,
4. meet a fundamental community need,
5. demonstrate our contribution will make a material impact on preferably a material number of 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 proof of why you cannot fund the need yourself and what other measures you have taken to seek third party contributions to the funding (e.g. 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 holds two funding pitch days each year, usually around May and November. This is an opportunity for charities to be selected to attend a meeting with trustees of WA Charity Direct to make a pitch for a funding grant. If you would like to register for a chance to attend one of the funding pitch days, please register with us at info@wacharitydirect.com.au. Only one registration per year is permitted.

All registrations will be acknowledged on receipt. Thereafter we will contact you in the month leading into our next pitch day, inviting you to submit an expression of interest (EOI). Please do not submit an EOI prior to receiving our invite. Should your EOI be selected, you will be invited to attend to pitch your charity or project to our Trustees. Attending the pitch day does not guarantee you will receive a grant. Also note, we usually receive many registrations. As a volunteer organisation, we do not have the resources to send you reminders if you do not respond to our invitation to submit an EOI. Nor do we enter into correspondence over why you may not have been successful.



Application Procedure

If you believe that your charity meets all or most of the above mentioned criteria, your charity can register for a chance to pitch for assistance from WA Charity Direct on one of our pitch days.

In the event you are selected to attend a pitch day, and you are not an existing charity partner of WA Charity Direct, in order for WA Charity Direct to meet its statutory obligations you must submit a completed application which 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
- 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 your charity’s sources of funds, donations and income
- 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 (this can be a copy of your EOI)

Please do not complete an application until you have received an invitation to attend our pitch day (not just an invitation to submit an EOI).

How much can we apply for?

There is currently no fixed amount that you can apply for, however the maximum amount we will usually fund is \$10,000.

How often can we register?

Charities cannot register to pitch more than once in any 12 month period.

WA Charity Direct’s main focus is on assisting individual Western Australian residents in need. However we recognise that one of the most effective methods of helping larger numbers of individuals is to partner with existing charities that focus on assisting significant numbers of needy Western Australians.

Generally, WA Charity Direct prefers other charities not to become too reliant on any assistance we may give. However, where we select to partner with another charity who can deliver assistance to a large number of high need 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 guided by WA Charity Direct’s charter, verification of every application is essential to the process.

Applicants and third parties listed in your application may 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 your application or by further independent checks carried out by our trustees usually leads to an unsuccessful application.



What happens if my application/pitch is successful?

You will be notified, usually by email, of the outcome of your pitch. If successful you will be requested to sign a memorandum of understanding (MOU) setting out the details of the grant. Attached to the MOU will be our standard acquittal form. You will be expected to complete and return the acquittal form about 12 months after the grant has been awarded. Failure to return the acquittal form will be taken into consideration with any future registrations.

Promotion and Information Sharing

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

For successful applicants, WA Charity Direct requests (wherever possible) relevant photos, social media sharing, project updates, letters of appreciation and to use your charity's name, cause and project for promotional purposes and for distribution to our members and followers. 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.

WA Charity Direct also has two functions each year, a Members Function to thank all members and a Corporate Breakfast for our corporate members. We look to involve our charity partners at these events whenever possible, to ensure our members are aware of the impact these partnerships have on Western Australians in need.

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 voluntary Board of Trustees run WA Charity Direct. The Board comprises Simon Birkhead, Jeff Miller, Andy Brown, Ron Dwyer, Justin Manolikos, Scott Stanley, Simon Cherry, Karron Johnson, 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 a membership based charity located in Perth Western Australia that seeks to assist Western Australians in need.

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 may contact me to obtain further information, or more details, or further supporting documentation in regard to our application and I agree that we 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 our charity / case on their website.

I agree to provide photo opportunities and social media content, including tagging or sharing, about our charity and relevant projects to WA Charity Direct as opportunities present.

Signature
Authorising all of the above

Date

Declaration of the Applicant

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

Signature

Date

Position in Charity