

GRANT GUIDELINES



About The R E Ross Trust

The R E Ross Trust is a perpetual charitable Trust established in 1970 in Victoria by the will of the late Roy Everard Ross. Since its inception, the Trust has distributed over \$95 million in grants for charitable purposes in Victoria. Governed by five Trustees who manage the Trust's assets and distribute its income, the granting priorities of the Ross Trust are set by the Trustees who take into account the wishes of the Trust's benefactor, Roy Everard Ross, and are influenced by the changing needs of the community.

More information about Roy Everard Ross, the Ross Trust and its values, granting philosophy, Trustees and staff are available from the Trust's website at www.rosstrust.org.au.

Statement of Commitment

The Ross Trust will direct resources towards projects and other activities that:

1. Address disadvantage and inequity
2. Encourage and promote social inclusiveness, community connectedness, health and wellbeing
3. Protect and preserve Australian flora and fauna.

In order to fulfil this commitment the Trust directs its resources to areas of the highest priority need where there is the greatest potential for impact. Therefore, the Trust currently accepts applications under four chosen impact areas.

Impact areas

- A. Improved outcomes for the most disadvantaged, vulnerable and marginalised Victorians
- B. Improved outcomes for children and young people at risk (0–18 years)
- C. Improved access to and achievement of equity and excellence in public education, arts and culture
- D. Protection and preservation of Australian flora and fauna

The Trust will consider applications for the following purposes:

- o Specific activities, services, projects and programs
- o Building and strengthening organisational capacity and general operations

Please refer to the Ross Trust website for detailed information on the Trust's priorities in these areas.

GRANT GUIDELINES



Eligibility

The Ross Trust can only consider requests from organisations that:

- Operate in Victoria or who will use the grant for the benefit of Victorians
- Have an ABN (Australian Business Number)
- Are incorporated

Applicants are NOT required to be a:

- Deductible Gift Recipient (DGR) or
- Tax Concession Charity (TCC)

Grant exclusions

The Trust does NOT make grants for the following purposes:

- To or on behalf of individuals
- Capital fund-raising for major building purchase, construction and maintenance works
- General fund raising appeals
- Motor vehicles and buses
- Purchases of major items of equipment
- Organisations or programs which 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
- Scholarships and bursaries
- Projects providing services for people with disabilities and/or learning difficulties; and their carers
- Projects for the aged and aged-related issues
- Arts projects for art's sake - however, the Trust will consider arts initiatives that support public education or that facilitate the improvement of social outcomes
- Provision of health and medical services - however, the Trust will consider projects that improve access to the public health system or support early intervention, prevention and health promotion for the disadvantaged
- Research, including scientific, medical, doctoral or post-doctoral
- Protection and welfare of domestic animals

The Ross Trust makes a substantial commitment to **Emergency Relief and Material Aid** through a triennial program and therefore does not accept unsolicited applications for this purpose. Please refer to the Ross Trust website for information on this program.

Lodgement of applications and closing dates

The Ross Trust accepts applications at any time throughout the year and has **no formal closing dates** for the submission of applications. Receipt of application is acknowledged by email followed by written notification of Trustees' decision within eight to twelve weeks of an application being received.

All potential applicants are advised to contact the Trust office to discuss their application **prior** to filling in an application form and submission.

Is necessary that grant seekers use the current application form and complete each section. Please refer to the Trust's website for the latest application form and lodgement instructions.

The Ross Trust reserves the right to seek assistance from external experts in examining and assessing applications.

Grants available

Grants of up to \$10,000 may be sought for one year only which includes small grants for capacity building, or;

Grants may be sought for periods of up to three years to a maximum of \$30,000 per year. Multi-year grants may be made where there is clear evidence that the organisation can demonstrate the impact to be achieved over this timeframe.

All requests must be based on, and include a fully costed budget. To gain an appreciation for the mix of activity and value of grants made by the Ross Trust in the current financial year, we suggest you review the recent grants made by the Trust on our website.

Assessment process

When prioritising requests, the Trust takes into consideration:

- Evidence of need and value for money
- Project reach/scope
- Impact
- Effective staff and/or volunteers
- Evaluation and measurement
- Strong governance
- Partnerships
- Sustainability

Impact areas

IMPACT AREA A: Improved outcomes for the most disadvantaged, vulnerable and marginalised Victorians

The Ross Trust's priorities are those experiencing personal, social or financial disadvantage.

Priority is given to applications supporting:

- Aboriginal Australians
- Asylum seekers, refugees, newly arrived migrants and culturally and linguistically diverse communities
- Greater access to health services for the disadvantaged
- Individuals/families experiencing violence, abuse or neglect
- Offenders, ex-offenders, those at risk of offending and their families
- Disadvantaged in small rural communities
- People who are homeless or at risk of homelessness

Applications to improve outcomes for Aboriginal Australians are accepted from:

- Aboriginal controlled or managed organisations (or in collaboration with); or
- Organisations with Aboriginal board members, staff or advisers.

IMPACT AREA B: Improved outcomes for children and young people at risk (0-18 years)

The Ross Trust prioritises programs working with children, young people and their families who are vulnerable and at risk.

Priority is given to applications addressing:

- Prevention and early intervention
- Vulnerable families with children in their early years
- Quality support for at risk young people and their families
- Education, employment and training for young people in their middle years
- Well-being of young people at risk.

GRANT GUIDELINES



THE
R E ROSS
TRUST

IMPACT AREA C: Improved access to and achievement of equity and excellence in public education, the arts and culture

The Trust seeks to promote, sustain and increase access, equity and the quality of individual and collective knowledge in Victoria.

Priority is given to applications contributing to:

- Advancing knowledge and understanding
- Increasing educational opportunity for the general population
- Promoting access, engagement and preservation of Victoria's history, art and culture
- Making information accessible to rural communities and future generations

The Trust will consider applications from a range of organisations including:

- Education and tertiary institutions
- Public institutions (museums, galleries, libraries and archives)
- Community organisations
- Information media, such as the internet, community radio, television and information centres

IMPACT AREA D: Protection and preservation of Australian flora and fauna

The Ross Trust prioritises applications that demonstrate conservation value with appropriate evidence

If the proposal is to purchase land; the proposal must demonstrate:

- High conservation value of the land
- How the land will be managed in the future to protect those values
- How the proposed action will contribute to a broader landscape scale approach.

Please note: It is unlikely that applications for environmental education will be successful.

Organisations must first submit an Expression of Interest for consideration by the Trustees. Organisations may then be invited to submit a full application.

The Expression of interest template is available at www.rosstrust.org.au

Privacy

The Ross Trust is committed to protecting the privacy and confidentiality of those we support. The Trust ensures all information provided in and arising from grant applications will be kept confidential.

The Trust may on occasion forward and/or discuss your application with external reviewers and/or other trusts and foundations. The Trustees use this information to inform their decision making. The Trust may also use information included in successful grant applications for promotional purposes.