## Ross Trust

## Educational Equity – Smart Grant application

Thank you for your interest in the Ross Trust and for completing the eligibility questions. The Ross Trust will only accept applications from eligible organisations.

Before completing this application form please read the Ross Trust Educational Equity guidelines to ensure your project is eligible for funding.

\* Required before final submission

**\*1. Organisation Details**

Organisation name

Postal address

Suburb/Town

State

Postcode

Telephone

Website URL

If your organisation does not have a website, please state in the field below

**Australian Business Number (ABN)**

Australian Government ABN Lookup

What type of organisation are you?

* Educational institution: early/primary/secondary
  + Kindergarten/ Early Learning Centre
  + Primary school (Victorian state government only)
  + Secondary school (Victorian state government only)
  + Primary/Secondary combination (Victorian state government only)
  + Vocational education provider
* Educational institution: tertiary
  + Higher education Provider
  + University/TAFE
* Not-for-profit
  + Incorporated Association
  + Company Limited by Guarantee
  + Indigenous Corporation, Association or Cooperative
  + Cooperative

I**s your organisation registered with the** Australian Charities **and Not-for-profits** Commission **(ACNC)?** [Tick Yes/No]

* If no, please confirm the funding request is from a Victorian state government school. [Tick Yes/No]
* If no, please note you will need to upload your organisation’s governing document and latest financial management reports in this application.

**What does your organisation do?**

(max 100 words)

**What year was your organisation established?**

**Head of Organisation** (CEO or equivalent)

Prefix

First name

Last name

Suffix

Position title

Office phone

Mobile phone

Email address

**Please provide a short biography below**

(max 100 words)

**Organisation Governance**

\***Please list board members and/or committee of management names and briefly state their main area of expertise.**

(max 100 words)

**\*How many board members are women?**

**\*How many board members are from culturally and linguistically diverse backgrounds?**

**The Ross Trust prioritises Aboriginal controlled or managed organisations (or in collaboration with) or organisations with First Nations board members, staff or advisers for funding requests for projects focused on First Nations people.**

**\*If your funding request is for a First Nations project, does this priority apply?** Y/N

**\*How many full-time equivalent (FTE) staff does your organisation employ?** (eg. a full-time staff member is 1.0 FTE, three days per week is 0.6 FTE etc.)

**Please describe any issues or trends impacting your work in your relevant sector** (eg. structural issues, government policy, economic or environmental issues).

(max 200 words)

**Contact for application**

Same as 'Head of Organisation'

Prefix

First name

Last name

Suffix

Position title

Office phone

Mobile phone

Email address

**2. Organisation Financial Details**

\* **What was your organisation's annual revenue in your last financial year?**

* Less than $50,000
* $50,000 or more, but less than $250 000
* $250 000 or more, but less than $1 million
* $1 million or more, but less than $10 million
* $10 million or more, but less than $100 million
* $100 million or more

\***Please provide a breakdown by percentage of funding sources for your organisation**.

(Total percentage must equal 100)

* Government funding/contract/grants (%)
* Services and fees (%)
* Investment/interest (%)
* Philanthropic grants (%)
* Fundraising (%)
* Other (%)

\***Annual total income in your last financial year**

**\*Net Equity in your last financial year**

**\*Assets** (including reserves)

**\*Annual income from all Government sources**

(enter zero if none)

**\*Liabilities**

**\*Annual Expenditure** (Total)

**\*Surplus/Deficit**

**Please provide an explanation of any surplus/deficit**

(max 50 words)

**Notes to the accounts: Provide explanation of any anomalies**

(max 50 words)

**3. Project Details**

Project Focus Areas

**\*What are the primary objective/s of this project?**

(select a maximum of 3)

* Alternative education pathways
* Early childhood education
* Education partnerships
* Educational ICT (Information and communications technology)
* Equal opportunity in education
* Family-school involvement
* Learning technology
* Out-of-school learning
* Primary education
* Research and development
* Secondary education
* Special needs education
* Strengthening schools
* Student retention
* Tutoring (homework clubs)
* Two-way learning
* Vocational education and training
* Other

**If you selected 'Other' above, please provide further details here.**

(max 50 words)

**\*Which of the following Educational Equity levers for change apply to this project?**

* Increase early learning participation – support engagement in early learning (ages 0-5) and improve readiness to commence primary school.
* Support at education transition points – support students, schools and communities to reduce educational disengagement at critical transition points.
* Strengthen school and community connections – enhance school effectiveness and capability to establish and maintain engagement.

**\*For what purposes will you use this funding?**

(select a maximum of 3)

* Project/program costs
* Pilot program
* Existing program
* Capacity building
* IT/database/website upgrade
* Staff development
* Volunteer coordination/recruitment
* Business/Strategic plan development
* Communications
* Technical expertise
* Capital costs
* Building and renovations
* Equipment
* Network building and collaboration
* Place-based intervention
* Research and development
* Monitoring and evaluation
* Advocacy
* Other

**If you selected 'Other' above, please provide further details here.**

(max 50 words)

**Population**

**\*Please provide a breakdown by percentage of age groups for this project.**

(Total percentage must equal 100)

* Children and youth (age 0-17)
  + Infants and toddlers (people aged 0-2)
  + Children (people aged 3-9)
  + Preteens (people aged 10-12)
  + Adolescents (people aged 13-17)
* Adults (people aged 18+)
  + Young adults (people aged 18-25)
  + Adults (26-64)
  + Seniors (65+)
* All age groups

**\*Which of the following education levels does this project focus on?**

* Early-years education
* Primary school education
* Secondary school education
* Tertiary education

**\*Will your project target a specific gender?**

* Diverse Gender Identity (DGI)
* All females
* Majority females (>60%)
* All males
* Majority males (>60%)
* Equal female/male/DGI
* No specific gender

**\*Which of the following ethnic and racial groups apply to this project:**

* Culturally and Linguistically Diverse (CALD) people
* First Nations people
* No specific group

**\*Social and Economic Status**

* Early school leavers (At-risk youth)
* Out-of-home youth (At-risk youth)
* Asylum seekers (Economically disadvantaged people)
* Homeless people (Economically disadvantaged people)
* Newly arrived (Economically disadvantaged people)
* Refugees (Economically disadvantaged people)
* LGBTQIA+ (LGBTQIA+)
* Caregivers (young) (Other)
* Other (Other)
* Victims of domestic and family violence (Victims of crime and abuse)

**\* Living Environment**

* Rural/regional dwellers
* Urban/metropolitan dwellers

**Health**

* People with mental health issues and/or behavioural disorders

**\*Which of the following Regions will benefit from this project:**

|  |
| --- |
| * Melbourne Metro * Barwon South West * Eastern Metro * Gippsland * Grampians * Hume * Loddon Mallee * Northern and Western Metro * Southern Metro * Statewide |

**\*Which of the following Local Government Areas will benefit from this project:**

* Melbourne Metro
  + City of Melbourne
  + Port Phillip
  + Bayside
  + Stonnington
  + Kingston
  + Glen Eira
  + Boroondara
  + All LGAs
* Barwon South West
  + Colac-Otway
  + Corangamite
  + Glenelg
  + Greater Geelong
  + Moyne
  + Queenscliffe
  + Southern Grampians
  + Surf Coast
  + Warrnambool
  + All LGAs
* Eastern Metro
  + Knox
  + Manningham
  + Maroondah
  + Monash
  + Whitehorse
  + Yarra Ranges
  + All LGAs
* Gippsland
  + Bass Coast
  + Baw Baw
  + East Gippsland
  + Latrobe
  + South Gippsland
  + Wellington
  + All LGAs
* Grampians
  + Ararat
  + Ballarat
  + Golden Plains
  + Hepburn
  + Hindmarsh
  + Horsham
  + Moorabool
  + Northern Grampians
  + Pyrenees
  + West Wimmera
  + Yarriamblack
  + All LGAs
* Hume
  + Alpine
  + Benalla
  + Greater Shepparton
  + Indigo
  + Mansfield
  + Mitchell
  + Moira
  + Murrindindi
  + Strathbogie
  + Towong
  + Wangaratta
  + Wodonga
  + All LGAs
* Loddon Mallee
  + Buloke
  + Campaspe
  + Central Goldfields
  + Gannawarra
  + Greater Bendigo
  + Loddon
  + Macedon Ranges
  + Mildura
  + Mount Alexander
  + Swan Hill
  + All LGAs
* Northern and Western Metro
  + Banyule
  + Brimbank
  + Darebin
  + Hobsons Bay
  + Hume
  + Maribyrnong
  + Melbourne
  + Melton
  + Moonee Valley
  + Moreland
  + Nillumbik
  + Whittlesea
  + Yarra
  + All LGAs
* Southern Metro
  + Bayside
  + Cardinia
  + Casey
  + Frankston
  + Glen Eira
  + Greater Dandenong
  + Kingston
  + Mornington Peninsula
  + Port Phillip
  + Stonnington
  + All LGAs
* Statewide

**4. Project Description**

**\*Project title**

**\*Project start date**

**\*Project end date**

**\*Brief project description**

Please use the following format for project summary below:

The [name of project] will address [main issues/problems/needs] for the purposes of benefitting [population group/organisation]. The project will [description of intervention/activities to be implemented] over the next [length of project]. These will bring about [key outcomes] and lead to [main project objective]. Our organisation can address these challenges [describe unique strengths/position to tackle the issues/problems/needs].

(max 200 words)

**\*Describe how your project fits with the Educational Equity lever for change selected in the Project Details page.**

•Increase early learning participation – support engagement in early learning (ages 0-5) and improve readiness to commence primary school.

•Support at education transition points – support students, schools and communities to reduce educational disengagement at critical transition points.

•Strengthen school and community connections – enhance school effectiveness and capability to establish and maintain engagement.

(max 150 words)

**\*What indicators are best aligned with your project?**

Please note that while your project/organisation may have other measurable outcomes, you will be required to report against Ross Trust’s indicators. Please select at least one indicator which relates to your chosen lever for change.

* Improved Australian Early Development Census (AEDC) Scores in target locations
* Increased parents/carers knowledge of the benefits of early learning education
* Increased early learning participation and enrolment rates
* Increased enrolment in the first year of primary school
* Increased partnerships with parents/carers and community
* Increased retention rates at transition points
* Improved student wellbeing including mental health and community connection
* Increased personal resilience and cultural connection
* Increased school capability to support vulnerable students
* Increased secondary school completion rates
* Improved data collection processes and capacity to utilise data
* Increased school and community connection and collaboration

**\*What are the identified needs this project will address? What evidence of need do you have?**

(max 200 words)

**\*Who else is addressing the need? Is the proposed project distinct or are you working with others?**

(max 200 words)

**\*How many people will benefit from this project?**

(max 50 words)

**\*Have you applied a gender lens to this project?**

Yes/No/Don't know

**If yes, how did you account for gender differences in the design and execution of your project?**

(max 100 words)

**Provide any additional information that will assist us to better understand the background, rationale or need for the activity**.

(max 100 words)

**\*All projects have some risk. Please outline up to three key risks that may affect the successful completion of your project and how they will be addressed.**

**5. Objectives and Measurement**

In the table below, please provide one to three project objectives and how you are going to measure those stated objectives. If successful, you will be required to report against your stated objectives.

You must complete at least 1 objective.

**\*Objective 1**

(max 100 words)

**\*How will you measure objective 1?**

(max 100 words)

**Objective 2**

(max 100 words)

**How will you measure objective 1?**

(max 100 words)

**Objective 3**

(max 100 words)

**How will you measure objective 1?**

(max 100 words)

**\*What data will be collected and by whom?** **What plans do you have to share your work with others? (eg. data sharing agreements, forums/roundtables, publications?**

(max 250 words)

**Do you plan to scale or replicate this project? If so, how?**

(max 100 words)

**\*6. Project Budget**

**Project Budget Details**

Provide budget details for your project including details of other funding that has been confirmed and/or applied for below.

Please note: The total income (comprising Ross Trust request + confirmed funding + unconfirmed funding) and expenditure must balance to zero. Click on the balance remaining calculator at the bottom of the expenditure section to check this.

Please enter numbers only (no commas, decimal points or $ signs) Total Project Cost

Enter the total cost of your project

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Project Budget | | | | |
| Requested from Ross Trust | 0 | Year 1 | Year 2 | Year 3 |
| 0 |  |  |
|  | |  |  |  |
| Organisation cash contribution | | Year 1 | Year 2 | Year 3 |
|  | |  |  |  |
| Confirmed other funding sources | | Year 1 | Year 2 | Year 3 |
| |  | | --- | |  | | | |  | | --- | |  | | |  | | --- | |  | | |  | | --- | |  | |
|  | | 0 | 0 | 0 |
| Unconfirmed other funding sources | | | | |
| |  | | --- | | [Application form includes expected outcome date] | | | |  | | --- | |  | | |  | | --- | |  | | |  | | --- | |  | |
|  | | 0 | 0 | 0 |
| Total Income:  Ross Trust + Confirmed + Unconfirmed Funding | | 0 | 0 | 0 |
|  | |  |  |  |
| Expenditure items | | Year 1 | Year 2 | Year 3 |
| |  | | --- | | [8 lines max.] | | | |  | | --- | | 0 | | |  | | --- | |  | | |  | | --- | |  | |
| Total Expenditure: | | 0 | 0 | 0 |
|  | |  |  |  |
| In Kind contribution sources | | Year 1 | Year 2 | Year 3 |
| |  | | --- | |  | | | |  | | --- | | 0 | | |  | | --- | |  | | |  | | --- | |  | |
| Total In Kind: | | 0 | 0 | 0 |

Ross Trust Funding

Total amount requested from Ross Trust

Yearly Payment Amounts

If you are applying for a single year grant only, just enter the total amount requested into ‘Amount Requested Year 1’.

If you are applying for a multi-year grant from the Ross Trust enter the amounts required in Years 2 and 3 below.

Other Funding

Organisation cash contribution

Confirmed funding (list name of funders and confirmed amounts)

Unconfirmed funding

If you have applied for other funding that is unconfirmed please list the name of the organisations applied to, the amount for each year and the expected outcome date (if known).

Expenditure

Provide expenditure item details below (short descriptions only) and amounts for each year. Note: for salaries - positions, titles and FTE should be provided in the expenditure item field.

In-kind contributions

(include an estimated value for non-cash contributions such as overheads, staff time and/or materials)

Please include the in-kind contributions from your organisation and project partners.

**\*7. Referees**

Please include the name and contact details of two project referees, who may be contacted by the Ross Trust. Letters/emails of support must also be attached at the end of this application.

Referee 1

Name

Position title

Organisation

Email

Telephone

Relationship to applicant organisation

Referee 2

Name

Position title

Organisation

Email

Telephone

Relationship to applicant organisation

**8. Attachments**

Please upload the following documents

**\*Latest Annual Report**

Please provide a copy of your organisation's latest annual report in either PDF or MS Word format.

If your organisation does not have an Annual Report you can provide minutes from your annual general meeting, Annual Information Statement, Department of Education and Training Annual Report to the School Community or similar.

Depending on the size of the document uploading may take a few minutes. Please wait for the upload to complete before proceeding.

**\*Latest audited financial statement or latest financial management reports**

The Trust will accept the latest financial management reports if your organisation is not required to produce audited financial statements**.**

**\*Letters of support**

Include at least two letters/emails of support from referees external to your organisation and any further letters of support from other project partners. Please ensure that support letters provide specific commentary about what you are requesting funding for, your organisation, staff/personnel and what support is being provided by each organisation, if applicable.

**\*9 Bank Details**

Provide bank details below. If your application is successful, funds will be transferred by EFT into the nominated bank account.

\*Bank name

\*BSB number

\*Account name

\*Bank account name

Accounts receivable contact.

\*Prefix

\*First name

\*Last name

\*Email address

\*Phone (business hours)

Must be an Australian phone number

**\*10. Endorsement**

I confirm that this application is made with the knowledge and approval of the CEO or delegated equivalent of the applicant organisation.

I endorse this application and agree to the following conditions:

* That the Ross Trust may forward and/or discuss this application with external reviewers and/or other trusts and foundations if and when required.
* We agree that the Ross Trust may use the general information contained in this application for promotional purposes.
* I acknowledge that I have read the Ross Trust ‘Terms of Engagement’ and can confirm that if successful in our application, our organisation will comply.

We agree to inform the Ross Trust of any significant changes to our organisation’s governance and/or financial situation.

Date:

I have read and agree to the above

**TERMS OF ENGAGEMENT**

Please note: that grants made by The Ross Trust are generally regarded as gifts for the purposes of GST legislation and therefore not subject to GST

**Use of grant:** The Grantee will use the whole of the grant exclusively for the project as described in the application and not for any other purpose. The Grantee will promptly advise the Ross Trust of any material change which may affect the Grantee's ability to undertake or complete the project within the specified period. All grant funds should be expended only within Victoria and only for charitable purposes.

**Timeframe:** The Grantee will use its best endeavour to complete the project within 12 months (for a one-year grant) from the date of receipt of the grant (or within the specified period of the grant).

**Payment:** For multi-year grants, a satisfactory progress report is required from the Grantee within 12 months of the date of receipt of the grant and each subsequent year after. All payments are subject to a satisfactory report and signed statement of solvency.

**Accounts**: The Grantee will show the grant separately in its books of account and keep records adequate to enable the use of grant funds to be checked readily.

**Acknowledgmen**t: The Grantee will acknowledge the assistance of the Ross Trust in any published or display material and provide it to the Ross Trust for review at least one week ahead of its publication by emailing communication@rosstrust.org.au

**Report:** The Grantee will give the Ross Trust a final report at the end of the specified period and within two months of completion of the project.

**Unexpended funds:** If the Grantee cannot complete the project/purposes as outlined in the application, please advise the Ross Trust as soon as possible. Any unused portions of the grant may be required to be repaid.