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SHIRE OF DUMBLEYUNG

bAIN ESTATE fUTURE FUND

GUIDELINES AND APPLICATION

2019/2020

1. **Introduction**

In May 2013 the Shire of Dumbleyung was the sole beneficiary to the Estate of Ian Bain. The will contained a wish that the money be used to assist sporting groups, emergency organisations and hospital services within the shire; however, the wish does not impose an obligation to restrict spending to these three areas.

The intention of Council is for the Bain Estate Distribution to be used for the benefit of the shire over a thirty-year period. The aim is to distribute the money to the community in similarly equal distributions over the thirty-year period, considering the time value of money, but if satisfactory projects are not presented then leftover funds will be used after the thirty-year period.

The amount available to be distributed each year will be determined through the annual budget process, considering past decisions and the current financial climate. Applicants are required to provide, where possible, a minimum of one local quote per each type or material or contract sought.

Community consultation is to take place every few years regarding the future fund distribution.

1. **Application Period**

Applications to the fund will close in May.

*2019/2020 Application Period*

Application Close Date: 03 May 2019 - 12.00pm (lunchtime)

Projects need to be completed by 30 June 2020 to eligible for funding.

1. **Principles**

The following principles have been developed by Council to guide the distribution of the Bain Estate Future Fund.

Principle 1 –

Matching funds from the application are required. The level of matching funds required will be dependent on the ability of the applicant to raise funds.

Principle 2 –

Projects that come under recreation, health or emergency service will gain in preference.

Principle 3 –

Projects that align with the shire’s strategic plans will gain in preference.

Principle 4 –

The ability of the applicant to fund any future requirements of the project or the need to draw on the fund in the future will be taken into consideration.

Principle 5 –

The fund is not to be used for shire capital or maintenance costs of roads, plant & equipment, footpaths, depot & administration buildings, housing, shire employee costs, overheads or plant operating costs.

1. **Availability**

Grant applications can vary in monetary value. The minimum shire contribution is $500. The level of matching funds required will be dependent on the ability of the applicant to pay. Applicants must contribute a minimum cash component as per the following guide but not restricted to these amounts.

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| --- | --- |
| **Total Project Cost** | **Applicant cash contribution percentage guide**  |
| Less than $5000  | 50% |
| $5001 - $15000  | 40% |
| $15001 - $30000 | 30% |
| Greater than $30000  | 20% |

**IN-KIND**

In-kind funding is calculated at the following rates;

* Volunteer Hours (unskilled) – calculated at $25 per hour per person
* Experienced Labour (e.g. volunteer members that is a licensed electrician, plumber, builder etc.) - calculated $75 per hour
* Donated Materials (including machinery) – calculated at $150 per hour

The cash contribution for a project is still required to meet the funding guidelines (i.e. 20% cash contribution) the in-kind is to be offset and show in both expenditure and contribution table, ideally cancelling each other out.

**Example of in kind Contribution**

*TOTAL PROJECT BUDGET*

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| *Items* |
|  | *In Kind*  | *Amount (inc GST)* | *Total Cost* |
| *Purchase of Portable Toilet* |  | *$1500.00* | *$1500.00* |
| *Transport from Warehouse* |  | *@ $25* |  |  |
|  | *@ $75* |  |
| *3 hours* | *@ 150* | *$450.00* |
| *Grand Total* | *$1900.00* |

*APPLICANT FINANCIAL CONTRIBUTION AND OTHER SOURCES*

|  |  |
| --- | --- |
| *Applicant / Funding Body* | *Value $* |
| *Community Group – Cash Contribution 50%* | *$750.00* |
| *Transport In-Kind*  | *$450.00* |
| *Bain Estate Future Fund* | *$750.00* |
|  | *Grand Total* | *$1900.00* |

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| *Total Project Amount $1500.00* *Amount Requested from Bain Estate Fund $750.00* |

Applicants who will also be applying through Department of Sport & Recreation will be rewarded with an additional 5%.

You MUST discuss your project with our Bain Estate Future Fund Staff Member before completing and submitting your application. Failure to do so will render your project ineligible. Please phone Mary-Ann Davidson or Emily Edwards on 9863 4012 or mdavidson@dumbleyung.wa.gov.au or eedwards@dumbleyung.wa.gov.au

1. **Who can apply?**

Anyone within the Shire of Dumbleyung boundaries are eligible to apply. Council will look more favourably on applications from the following;

* Hospital Services (a project that will benefit health services in the Shire of Dumbleyung),
* Emergency Services (a project that will benefit emergency services within the Shire of Dumbleyung),
* Sporting Groups (a project by a sporting group that will benefit sport in the Shire of Dumbleyung); or
* Projects that align with any of the shire’s plans

Individuals with a project that there is a perceived personal gain will not be eligible.

1. **What can be funded**

Money received through this fund may be used as a contribution towards project costs. Such expenses may include but not limited to:

* Capital items or infrastructure including equipment, furniture, machinery etc.;
* Improvements / Additions to existing Shire buildings
* Administration expenses;
* Advertising and promotion;
* Catering, food and drink;
* Entrance and admission fees;
* Insurance;
* Project materials;
* Venue and equipment hire;
1. **What cannot be funded**

On completion of the Bain Estate Future Fund pilot project round the following criteria will not be funded.

* Individuals with a project that there is a perceived personal gain will not be eligible.
* Recurring projects after initial application approval
* Shire capital or maintenance costs of roads, plant & equipment, footpaths, depot & administration buildings, housing, shire employee costs, overheads or plant operating

Projects that obtain a ranking score of under 55 out 100 will be recommended to council not to be funded.

1. **Application Timeline**

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| **Date** | **Process** |
| 1st July each year | Applications Open |
| 1st Week in May | Applications Close |
| 2nd Week in May | Ranking of Applications by Staff |
| 3rd Week in May | Applications go to May Council Meeting– Applicant must be available for a forum or Council Meeting to go through project application if required.  |
| 3rd Week in June | Applicant advised of Council Decision on their application.  |

1. **Acquittal Process**

The applicant will be required, at the completion of the project to provide a tax invoice issued to the shire from the applicant and any associated supplier invoices. At the conclusion of the project, local advertising of the project is required.

1. **Submitting your application**

To complete your application, you will need to complete the form included in this package. Make sure you answer **all** questions. When submitting your application please do not bind hard copy applications in any way other than with a paper clip.

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| --- | --- |
| **Post** | Attn: Mary-Ann DavidsonShire of Dumbleyung PO Box 99DUMBLEYUNG WA 6350 |
| **Hand Delivered** | Attn: Mary-Ann DavidsonShire of Dumbleyung Cnr Harvey & Dawson StreetDUMBLEYUNG WA 6350 |
| **Email** | mdavidson@dumbleyung.wa.gov.au  |

Once completed your application can be submitted in the following ways:

You only need to submit your application once. A confirmation of receipt of your application will be forwarded to you once your application is received.

1. **Application Approvals Process**

Once application close at 12.00pm on Friday 03 May 2019, an item will be prepared for the Council Meeting, here council will decide on which projects it wishes to fund. All applicant will then be advised of the outcome of their application. Council decision will be evaluated on a weighting scale, providing an equal opportunity to all applicants.

**Project Checklist**

Have you met the funding criteria?

⎕ Statement of need

⎕ Meets Bain Estate Criteria

⎕ Aligns with any Shire Plan

⎕ Level of financial contribution

⎕ Overall benefit to community/region medium to long term

⎕ Project planning and management ability

⎕ Ability to meet ongoing and maintenance costs

Have you provided the following?

 ⎕ Completed application form

 ⎕ Two written quotes

 ⎕ Proof of financial contribution

 ⎕ Any other supporting documents

**GRANT APPLICATION FUND**

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| **You MUST discuss your project with our Bain Estate Future Fund Staff Member before completing and submitting your application. Failure to do so will render your project ineligible.** |
| **Contact: Mary-Ann Davidson or Emily Edwards**08 9863 4012 or mdavidson@dumbleyung.wa.gov.aueedwards@dumbleyung.wa.gov.au  | Date of discussion:\_\_\_\_/\_\_\_\_/\_\_\_\_ |

**APPLICANT DETAILS** (please be concise but include all relevant information)

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| **Organisation/Group Name** |
|  |
| **Contact Details** |
| **Name** |
| **Postal Address** |
| **Phone** | **Email** | **Mobile** |

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| **Is your organisation/group registered for GST? 🞏 Yes 🞏 No** |
| **ABN #** |

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| **Organisation Description (if required, please tick more than one)**  |
| **🞏 Incorporated Association****🞏 Volunteers / Community Group****🞏 Charitable Organisation****🞏 Special Interest Group****🞏 Other (please specify)** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | **🞏 Health Service Provider****🞏 Emergency Service Provider****🞏 Sporting Group/Body** |

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| **Project Name** |
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| **Project Description** – Briefly provide a summary of the project describing what it involves, its objectives and how completion of the project will achieve them. (no more than 300 words) |
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| **Project Need –** Please details why your project is needed by the community including what specific needs will be met (Statement of need) |
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**ONGOING OPERATING AND MAINTENANCE COSTS**

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| **Are ongoing operating and maintenance costs involved with your project? Please detail these costs and how your organisation will meet them.** |
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| **Has your organisation applied for funding through other sources? 🞏 Yes 🞏 No** |
| **Name of organisation** | **Name of grant** | **Were you successful Yes / No** | **Date applied** |
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**PROJECT BUDGET –** how will you spend the Bain Estate funds?

Where possible, please attach all supplier quotes/estimates for any goods and services being sought for the entire project. Applications require applicants to provide, where possible, a minimum of one local quote per each type of material or contract sought.

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| **Items** |
|  | **In-Kind** | **Amount (inc GST)**  | **Total Cost** |
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|  |  |  |  |
| **Grand Total** | **$** |

**APPLICANT FINANCIAL CONTRIBUTION AND OTHER SOURCES**

*(The Total figure should balance back to the total project amount and should include all funding sources eg. Lotterywest, Sport & Rec, In Kind funding etc)*

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| --- | --- |
| **Applicant / Funding Body** | **Value $** |
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|  |  |
|  |  |
|  |  |
|  |  |
|  | **Total** | **$** |

|  |  |
| --- | --- |
|  |  **Total Project Amount $** **Amount Requested from Bain Estate Fund $** |

**DECLARATION**

The person with delegated authority must sign this declaration.

I have read the Shire of Dumbleyung’s Bain Estate Future Fund policy.

I certify that all information provided is current and correct. Furthermore, I give permission to the Future Fund to contact any relevant persons or organisation in the processing of this application.

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| --- | --- |
| **Signed** |  |
| **Name** |  |
| **Position** |  |
| **Date** |  |