



CHARITIES APPLICATION GUIDELINES

Introduction

WA Charity Direct is a private member charity that raises money by donation from its members.

It 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.

The main objective of WA Charity Direct is to assist individuals in need that do not have the ability to help themselves.

Charities Assistance

Although WA Charity Directs main aim is to assist individuals in need, part of our charter also allows us to assist other smaller registered charity organisations that do not have a geared up charity collection mechanism or receive a major part of their funding from Government bodies.

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

1. be registered as a charity,
2. be endorsed by the A.T.O. as a charitable fund and have deductible gift recipient status,
3. not receive any funding (or a major part of your funding) from Government bodies,
4. not be a main stream charity and / or have a geared up charity collection mechanism,
5. be in need of funds for a particular purpose,
6. meet a fundamental community need (ideally involving children).

WA Charity Directs charter also only provides for claims for parties who reside in **Western Australia**.

Application Procedure

If you believe that your charity meets all 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 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
- 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.

Reasons are not given for unsuccessful applications.



How much can I apply for?

There is currently no fixed amount that you can apply for. 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 Directs main focus is on assisting individuals in need.

Additionally WA Charity Direct does not want other charities to become reliant on any assistance it may give.

As such, any funding applied for / granted, should be considered as a one off.

How long does it take to process my claim?

All applications will be acknowledged on receipt.

Applications are processed as quickly as possible but will be delayed or set aside if all of the information outlined in the application procedure is not provided.

Applicants are immediately advised of the outcome of the claim once a decision is made. Reasons are not given for unsuccessful applications.

Verification of Information Provided / 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 Directs Charter, verification of the applicants application are essential to the process.

In almost all cases, applicants and third parties listed in the application, will be contacted by telephone 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 charities 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 and the further independent checks done by our trustees usually leads to an unsuccessful claim.

What happens if my application is successful?

If your claim 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.



Promotional / Information Sharing

Part of WA Charity Directs 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 the charity's profile.

For successful applicants WA Charity Direct may require photos, letters of appreciation or to use your charities name / case for promotional purposes and / or for distribution to our members. Details of your charity / case may also be displayed on our website as a record of the organisations / 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?

Applications for assistance are considered by the Board of Trustees.

The Board comprises of: Peter Carter, Damien Eves, Jeff Miller, Simon Birkhead, Andy Brown, Ron Dwyer, Justin Manolikos, Scott Stanley, Robyn Preston, Simon Cherry & Pauline Eves.

The Board of Trustees run WA Charity Direct.

The individuals act as trustees for WA Charity Direct in accordance with its Trust Deed.

How can WA Charity Direct be contacted?

WA Charity Direct's office is located in Perth, Western Australia.

Contact details are:

Postal Address: PO Box 389
Osborne Park WA 6917

E-mail: info@wacharitydirect.com.au



Appendix 1

APPLICANT AGREEMENT

(must be attached to your application)

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 regards 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