



**Financial Assistance Grants for
Incorporated Clubs and Community Organisations
2024 / 2025**

Closing Date for Applications – Tuesday 4 June 2024

SECTION A
Applicant Information

Name of Organisation:

Postal Address:

Street Address (office or premises):

Contact Person

Name: _____

Telephone: _____

Position: _____

Email: _____

I, being the contact person listed above, acknowledge that the above organisation accepts the terms and conditions of the grant, as outlined on page 4.

Is your organisation an incorporated body? Yes / No _____

Are you registered for GST purposes? Yes / No _____

If yes, please provide your ABN: _____

SECTION B

General Information about your Organisation

Describe the main purpose of your organisation and the services it provides:

Please provide membership numbers for the last three years:

2023 / 2024 - _____ 2022 / 2023 - _____ 2021 / 2022 - _____

Please provide information on how often your organisation meets and that it is actively operating. Detail how your organisation operates ie: volunteers, paid staff or a combination.

What geographical area does your organisation cover?

Please describe eligibility requirements for membership or access to your service(s).

Do you have any other comments?

SECTION C

Details of your Grant Application

Please supply the following details:

Project Title

Reason for Funding?

Benefits of project / who will benefit?

How does this project relate to your organisation and its goals?

If you are requesting a grant for maintenance on a building, please indicate who owns the building and the land that it is situated on.

If this relates to a recurring event, number of attendees at the previous event _____

Amount of grant requested \$ _____

Project Total (If applicable) \$ _____

Own Funding (If applicable) \$ _____

Funds held which could be accessed for the project \$ _____

Other Funding (If applicable) \$ _____

The Council will consider funding up to one third the cost of one-off projects. Please provide details of funding assistance recently sought from other funding bodies, including for this application.

SECTION D

How to Lodge this Application

Please complete and submit this form to the Shire by the due date of 4 June 2024. All applications must be complete in order to be considered.

Late applications or applications which do not include the required financial information will **not** be considered by the Council.

Please attach the following to this application:

- Any additional information that you believe will assist this application;
- A copy of the audited financial statements for your organisation for the last financial year. If these are not available, the minimum requirement is the organisation's most recent profit and loss statement and balance sheet;
- Quotes that support dollar amounts of the project; and
- Plans or diagrams that easily illustrate your request, if applicable.

Ways to submit your application:

- By Post: To Shire of Plantagenet, P.O. Box 48, Mount Barker, WA, 6324.
- In Person: To Shire of Plantagenet, 22-24 Lowood Road, Mount Barker, WA, 6324.
- By Email: To info@sop.wa.gov.au

Please contact the Shire on 9892 1124 or email info@sop.wa.gov.au if you have any enquires about making an application.

SECTION E

General Information

Council Policy on Financial Assistance to Incorporated Organisations and Clubs

POLICY NO: CF/DG/2

FORMER POLICY NO

FINANCIAL ASSISTANCE (OPERATING) TO INCORPORATED ORGANISATIONS AND CLUBS

| DIVISION | BUSINESS UNIT | RESPONSIBILITY AREA |
|---------------------------|--------------------------|-----------------------------|
| <i>Corporate Services</i> | <i>Community Funding</i> | <i>Donations and Grants</i> |

OBJECTIVE:

To assist incorporated clubs and organisations in meeting their objectives for the benefit of the residents of Plantagenet.

POLICY:

1. *The Council's annual Community Assistance (operating) Grants are advertised in March of each year and assessed in May with funding available to successful applicants commencing in July. Two funding streams are available; one for operating grants and one for capital grants.*
2. *This stream is for annual community (operating) grants and is capped at 0.5% of annual rates. Community groups leasing Shire buildings are not excluded from making an application for an operating grant under this policy, however Endorsed Community Service Organisations are excluded as they are to apply under guidelines established in Council Policy CF-DG-3.*
3. *Applications will be prioritised based on what the Council believes will provide the greatest overall benefit to the quality of life of the residents of the Shire of Plantagenet.*
4. *The Council may decide to reimburse all or part of an organisation's annual Property and Waste Rates in lieu of a donation, unless restricted by Council Policy A/PA/14 – Sporting and Community Organisations using Council and Vested Land – Rateability.*
5. *Applications from incorporated organisations or clubs must meet the following criteria to be considered:*
 - a) *The group is to be based in the Shire of Plantagenet, or benefit residents within the Shire.*
 - b) *Applications should clearly identify the Shire of Plantagenet group(s) who will benefit from the funding.*
 - c) *The group should be actively operating and meeting on a regular basis. Applications should advise the number of active members or participants.*
 - d) *Applications should include a copy of the audited financial statements of the organisation for the last financial year. If these are not available, the minimum requirement is the organisation's most recent profit and loss statement and balance sheet. Applicants should advise the funds held by the Group which could be accessed for the project (that is, the financial need for a Community Grant).*

- e) *Applications must be made in full with supporting documentation and must be received by the due date. Incomplete applications or applications not received by the advertised deadline, will not be considered.*
- f) *Applications must state the reason for funding and amount required. Applicants should also provide details of the group's own contribution to the project, where applicable.*
- g) *Applications from groups that operate a facility with sale of alcohol are likely to receive increased scrutiny over other applications.*
- h) *Applicants are where possible requested to show that they are actively seeking assistance from other funding bodies. Applicants must also disclose if they are seeking grant funding from other donors for this application.*
- i) *Where funding relates to a recurrent event, applicants should advise number of attendees at the previous event.*

6. *The following category limits be set to guide the community in its expectations and the administration in making a recommendation.*

| Expenditure Category | Cap (\$) |
|---|---|
| Regional event (event aimed at and capable of attracting people from outside the Shire boundary) | \$5,000 |
| Local event | \$1,500 |
| Community group – Project This can include maintenance and upgrades to equipment or programs that benefit residents. | Up to one third of the project cost with a maximum limit of \$5,000 |
| Community group – Operating costs or other support such as minor equipment and skills development and / or governance training for volunteers | \$2,000 |

- 7. *Approved grants will not be disbursed until the organisation's GST status has been determined and proof of expenditure/purchase of approved grant has been provided, where applicable.*
- 8. *The Council will determine its total financial commitment to community funding for the upcoming financial year, as part of its budget preparation, and may exclude projects on the basis that it cannot be accommodated in the budget.*
- 9. *Organisations and clubs will be notified of the result of their application immediately following the adoption of the Council's annual budget.*

ADOPTED: NOVEMBER 2009

LAST REVIEWED: 21 FEBRUARY 2023

Requests for new buildings and capital works on existing Shire buildings

Please **do not** use this form for applications for financial assistance that relate to new buildings or capital improvements on existing Shire buildings. The Shire has developed the following policies to guide such developments:

- Council Policy I/B/1 Capital Works - New and Existing Community Buildings
- Council Policy CS/CFGF/1 - Community Capital Assistance Grants

Together, these policies provide a guide where capital works on a Shire building are proposed by a lessee or a community group proposes a new building on Council controlled property. They also aim to provide an equitable and transparent framework for the assessment and ranking of capital grants for Shire community and sport and recreation facilities.

Please review these policies, which are on the Shire's website. Please feel free to contact Anthony Middleton on 9892 1124 or email info@sop.wa.gov.au for further information or assistance.

Information for not-for-profit organisations that lease a Shire building and provide a community service benefit

The Council has adopted a policy which provides for organisations deemed an 'Endorsed Community Service Organisation' (ECSO) to be eligible for an annual subsidy, to be determined by the Council, subject to an abridged annual application process.

Council Policy CS/DG/3 - Endorsed Community Service Organisations provides guidance on:

1. The process for a community group becoming an Endorsed Community Service Organisation.
2. The process and conditions for an Endorsed Community Service Organisation to access annual financial assistance.

Please review this policy, which is on the Shire's website to see if your organisation qualifies.

GST and Financial Assistance Grants

The Australian Taxation Office (ATO) has issued the GSTR 2000/11 '*Goods & Services Tax: Grants Of Financial Assistance*' which provides their rulings on grants of financial assistance and funding. A copy of this ruling may be found at <http://www.taxreform.ato.gov.au>.

Grants made to community organisations will be subject to GST where they represent consideration for a taxable supply. This means that grants which are subject to GST will need to be 'grossed up' by 10%, otherwise the grantee will have an effective reduction in funding. The grantee will be required to remit 1/11th of the grant to the ATO as GST and should be entitled to claim the input tax credits related to expenditure incurred. If a grantee is not registered, or not required to be registered, then no GST will be payable on the supply, however withholding tax may apply which would reduce the available amount of the grant.

Applicants are encouraged to obtain an ABN to avoid withholding tax difficulties

Terms and Conditions upon acceptance of a Grant

1. The grantee is required submit evidence of expenditure to the Shire of Plantagenet of the grant funding provided. (ie: a financial statement identifying all revenue and expenditure incurred on the project certified by the president of the applicant or any other form, information or supporting original documentation as required by the Council). Such evidence is not required for untied grants for operating expenditure.
2. Acknowledgment of the Shire's contribution must be made in an appropriate manner in a form acceptable to the Shire. (ie: the Shire of Plantagenet expects to be noted as sponsor in any advertising or promotional material in relation to the funded project. If the project is a building or other similar physical structure a plaque to be mounted in recognition of the Shire's contribution, signs erected in relation to the project to note the Shire of Plantagenet as sponsor, etc).
3. The grantee must use the grant funds within the relevant grant application financial year.
4. The grantee will provide an invoice to the Shire of Plantagenet in order for funds to be released, together with the evidence noted in Point 1 (including or excluding GST depending on grantee's GST status).