

EDUCATION APPLICATION (less than \$20k)

This document is for reference only. Applications will only be accepted via our online system.

To make your online submission experience easier [please read all of this information](#) before beginning an application. Click on the link to view, print or save the file for reference.

IMPORTANT:

As well as submitting the application online you must **MAIL A HARDCOPY** of the completed application, the budget and other requirements (if applicable) **to our office by 5pm on the closing date**. Hardcopies are required as applications may be sent to external expert reviewers. Please note that applications received after the closing date **WILL NOT** be considered irrespective of the postmark date.

ATTACHMENTS REQUIRED TO BE MAILED:

- **ABR printout**
- **Completed Application**
- **Budget**
- **Confirmation of funding** if applicable
- **Letters of support** if applicable

Refer to the Attachments section for full details of all requirements.

Please note that if you print a copy of the application form, the Attachments page must be printed separately.

Date of Application

Applicant Organisation

Exactly as per your ABN – Refer to the [Australian Business Register](#)

Applicant Organisation – AKA (acronym, trading name, former name)

Some organisations are known more commonly by a trading name. If your organisation uses a trading name please check that it is listed with your Entity Name on the [Australian Business Register](#).

Acronyms are the abbreviation formed by the initial letters of words e.g.

The Ian Potter Foundation - IPF. If an acronym applies to your organisation please include it here.

Australian Business Number (ABN)

Enter in the format 12 345 678 901

Select your organisation type

Your organisation's type is noted on the [Australian Business Register](#) or on your organisation's Notice of endorsement for charity tax concessions (TCC)

If your organisation is a State Government entity you will need to provide us with a letter from the Australian Taxation Office stating that but for its connection with government your organisation would be a charity and a tax exempt entity.

Select the primary focus of your organisation

- Arts organisation
- Botanical / Zoological / Geographical
- Community service
- Education
- Employment service
- Environment / Conservation
- Health Service / Hospital
- Library / Gallery / Museum
- Policy institute
- Professional association
- Research organisation
- Sporting club or association
- Think tank
- Welfare organisation

Address

Street / PO Box

City/Suburb/Town – Please use capital letters

State

Postcode

Organisation telephone

Enter in the format 0x xxxx xxxx

Organisation email

Web address

Organisation Street Address (if different to postal address)

City/Suburb/Town

State

Postcode

Head of Organisation (CEO or equivalent)

Prefix

First Name

Last Name

Suffix

Gender

Position Title

Email

Project Primary Contact

Prefix

First Name

Last Name

Suffix

Gender

Position Title

Email

Telephone

Enter in the format 0x xxxx xxxx

Mobile Phone

Enter in the format xxxx xxx xxx

Project primary contact address (if different to organisation address)

City/Suburb/Town

State

Postcode

ABOUT YOUR ORGANISATION

Describe the work of your organisation addressing each of the following:

1. Please provide a brief description of your organisation, including its history and mission.
Word count 0 of 200
2. The major programs and activities it offers.
Word count 0 of 300
3. How many paid full and part-time staff members are employed by your organisation?
What is the level of volunteer involvement?
Word count 0 of 100
4. Names of your current Patron(s) (if applicable)
A patron is someone that supports or champions an organisation, event or cause and is not necessarily a financial sponsor or benefactor
5. Names of your current Board Members
6. Its sources of income
Word count 0 of 200
7. Provide details of any significant organisational or financial information that has impacted on your organisation since your most recent Annual Report and audited financial statement.

This may include a change in business or program direction, funding received or discontinued, property acquired or sold etc. Please leave blank if you have nothing to report.
Word count 0 of 100
8. What is the size of your financial reserve?
The Foundation assumes that all organisations strive to develop a financial reserve. If this project is of high priority for your organisation, why can't the reserve be used to fund it?
Word count 0 of 200

REQUEST DETAILS

1. **Please indicate the geographic scope of the project**
[Where is your project taking place? In which State\(s\) and/or Territories will the beneficiaries of your project be?](#)

Select the relevant State(s) and/or Territories, or National if the initiative is Australia-wide.
☐ National ☐ ACT ☐ VIC ☐ NSW ☐ NT ☐ QLD ☐ SA ☐ TAS ☐ WA
2. **Select from the list below to indicate the geographic reach of your project**
☐ Metropolitan ☐ Regional ☐ Remote ☐ Rural

3. Indicate which population group(s) will be served by your proposed project.

If your project is research in nature, which population is most likely to benefit from this research in the longer term?

You may select up to 4 population groups.

- ☐ Babies/Infants
- ☐ Boys
- ☐ CALD
- ☐ Children
- ☐ Elderly
- ☐ Families
- ☐ Gay, Lesbian, Bisexual, Transgender, Intersex
- ☐ General Public
- ☐ Girls
- ☐ Indigenous
- ☐ Men/Fathers
- ☐ Refugees/Asylum Seekers
- ☐ Single Parents
- ☐ Students
- ☐ Women/Mothers
- ☐ Youth/Young People
- ☐ Other
- ☐ Not relevant

4. Which age groups will most benefit from your project?

- ☐ Early childhood (0-5)
- ☐ Children (6-13)
- ☐ Youth (13-18)
- ☐ Young adults (18-25)
- ☐ Adults (25-65)
- ☐ Older people (65+)
- ☐ All age groups
- ☐ Not relevant

5a. Which of the issue area(s) will you be working in?

You can select a maximum of 4 areas

- ☐ Education & Learning
- ☐ Employment and Training
- ☐ Organisational development/capacity building
- ☐ Other
- ☐ Skills and Professional Development
- ☐ Volunteerism

5b. Issue area

If you selected 'other' in the list above, please include the issue area(s) you will be working in

6. If your program involves schools please identify which group(s).

- ☐ Preschool (early childhood)
- ☐ Primary School Sector
- ☐ Secondary School Sector
- ☐ Vocational Education & Training / TAFE
- ☐ University Sector

7. Title of project

Word count 0 of 15

8. Describe your proposed project, clearly stating what you want to do with the funds.
[Please provide a brief statement of what your project intends to do and achieve. You will have opportunities to expand further in the application.](#)

This grant will enable us to. . . .

Word count 9 of 100

9. Concise summary of your project.

[If your application is successful, a concise description of your project will be included in our Annual Report. You may wish to refer to our past Annual Reports available in the Publications section on our website \[The Ian Potter Foundation\]\(#\).](#)

In one, or two sentences give your reason for undertaking the project and how you are going to do it.

Word count 0 of 25

10. What is the primary type of project support you are seeking?

- ☐ Capital Works
- ☐ Core Funding
- ☐ Equipment Purchases
- ☐ Health Promotion
- ☐ Landscape
- ☐ Operations
- ☐ Organisational Capacity Building
- ☒ Program Funding
- ☐ Research
- ☐ Social Enterprise and Entrepreneurship
- ☐ Specific Activities and Services
- ☐ Transport

11. How does your project relate to the Education funding objectives?

Please ensure that our funding objectives apply to your project. If you are uncertain and would like to discuss your project with the Education Program Manager, please call the Foundation on (03) 9650 3188

- (i) To support early intervention initiatives for children with a view to improving school readiness and/or parental engagement.
and / or
- (ii) To support initiatives and organisations working to provide basic material, personal and learning support to students.

Only comment on the objective(s) that closely align with your project.

Word Count 0 of 300

12. Select the Foundation's Funding Principles that best apply to your project.

You can select up to 7 principles.

- ☐ A Commitment to Excellence
- ☐ Focus on Prevention
- ☐ Innovate/Evaluate/Disseminate
- ☐ Leverage Potential
- ☐ Long-term Thinking
- ☐ Partnerships
- ☐ Sustainability

13. Briefly describe how your project addresses the Funding Principles selected above.

Word count 0 of 200

14. Total cost of the project

Please do not include dollar signs and round up to the nearest dollar e.g. 47,880

15. How much are you requesting from The Ian Potter Foundation?

Please do not include dollar signs and round up to the nearest dollar e.g. 15,000

16. How long (in months) will it take to complete your project?

i.e. 12 if your project will take one year, 24 for two years etc

17a. Project start date.

Please refer to our [funding round dates](#) for the earliest date that your project may start. We do not fund retrospectively. Please contact the office on (03) 9650 3188 should you wish to discuss the timing of your project further.

17b. Project end date.

18. If relevant, how will the project be sustained once the grant from The Ian Potter Foundation has been expended?

We realise that responding to a question on sustainability may be difficult. However, we are looking for responses that demonstrate that sustainability, if required, has been considered to some degree e.g. you may need ongoing philanthropic support or you may have considered fee for service.

Word count 0 of 150

PROGRAM LOGIC

Detailed project plan - A minimum of 2 project goals must be completed.

If you are successful in securing a grant, you will be required to report against achievement of these goals.

(i) What is your goal?

Word Count 0 of 50

(ii) What actions will you take to achieve this goal?

i.e. Will you need to work with others? Undertake planning? Advertise your event? Undertake background checks?

Word Count 0 of 200

(iii) What is the timeframe for delivering against this goal?

Include key stages and dates.

Word Count 0 of 200

(iv) How will you know if you have been successful in achieving your goal?

Consider your measures for success, KPIs or what success will look like. Make sure you consider things you will be measuring within your project, including numbers (quantitative) and feedback (qualitative) results.

Word Count 0 of 50

PROJECT BUDGET

A printed copy of your Budget must be mailed with the hardcopy of your application to the Foundation.

We are happy for you to use a format that works for you, but you may like to refer to, or use our [Budget Template](#).

Your budget should include the following headings where applicable.

Income

- Grants from government or other funding sources
- Cash contributions from your organisation
- Inkind contributions

Expenditure items

- A breakdown of salaries
- Consultants fees
- Capital costs
- Administration costs
- Equipment purchases
- Advertising and/or promotion etc.

Where relevant you must itemise each section, refer to example:

Income

Grants from government or other funding sources: \$93,000

- ABC Foundation \$15,000
- 123 Trust \$28,000
- Government \$50,000

ATTACHMENT SECTION

PLEASE read this section carefully. The application and all requirements must be submitted online but we also require a hardcopy of the application and some of the requirements to be mailed to the Foundation.

MAIL THE FOLLOWING – to be received in our office by 5.00pm on the closing date.

- ABR printout
- completed application
- the budget
- letters of support (if applicable)
- letters of confirmation of funding (if applicable)

Address:

Mrs Janet Hirst
Chief Executive Officer
The Ian Potter Foundation
Level 3, 111 Collins Street
Melbourne VIC 3000

UPLOAD the following requirements - refer to steps below:

1. Declaration. Print a copy of the application Declaration and arrange for it to be signed and dated by your organisation's Chief Executive Officer or equivalent. Then scan it and upload it as an attachment.
2. A scanned print-out of your organisations details from the [Australian Business Register](#).
3. A letter from the Australian Taxation Office (ATO), but only if your organisation is a Government Entity. The letter from the ATO must indicate that your organisation would be a charity 'but for its connection with government' and that it is a tax exempt entity. Please call our office on 03 9650 3188 if you require further information.
4. Annual Report - your organisation's most recent copy.
NOTE: If you are unable to provide an Annual Report you should include additional material such as AGM Minutes, Newsletters from the past year, or brochures detailing your activities.
5. Audited Financial Statement - your organisation's most recent signed and audited statement.
NOTE: If your audited financial statement is included in your annual report you do not need to attach it separately.
6. Letters of support should be included if you are working in partnership with another organisation, or working with schools or other organisations in the delivery of your project as they demonstrate that you have their support. Note: You may include up to 3 letters of support.
7. Letter(s) of confirmation for funding. If you have received confirmation of funding from other foundations / trusts, governments, outside sources the letter(s) of confirmation should be attached.

Note: If further information is needed in the review of your project you may be contacted prior to the Board Meeting at which the grant request is to be considered.

You should receive notification of the outcome of your application by mail within four months of the funding round closing date.