

# YINHAWANGKA DIRECT BENEFITS TRUST BUSINESS FUNDING APPLICATION PROCESS

## Summary of requirements

### Preliminary Information

Please complete this form providing concise information to support your application.

If your grant application is for \$50,000 or more, the primary contact for the project must speak to the Trustee prior to submitting the application. At this point you will be advised of the additional level of information which will both assist your application and give you an indication of the current availability of funds to finance larger projects.

### How to lodge your application

The Trustee must receive your application in both email and hard copy forms.

The email form should be sent to [perthadmin@mutualtrust.com.au](mailto:perthadmin@mutualtrust.com.au) any supporting information can be sent by attachment in PDF format.

The hard copy of the Application Form and any supporting material should be posted to the address below, or be couriered or hand delivered:

**Street Address:**            **Yinhawangka Direct Benefits Trust**  
                                      **C/ Mutual Trust Pty Ltd**  
                                      **Suite 12, Level 1, 40 St Quentin Avenue,**  
                                      **Claremont WA 6010**

**Postal Address:**         **PO Box 307**  
                                      **Claremont WA 6910**

Your application will be acknowledged by email.

You may be asked for further information either prior to and/or after the meeting at which your application will be considered. You will be advised of the outcome of your application by mail.

### When to lodge your application

The Trust has the following six monthly funding rounds for applications from organisations.

### What must be in the funding application?

The funding application must set out:

- Full details of the proposed business venture;
- Details of who will benefit from the project;
- Include projected outcomes (must be measurable);
- A detailed budget for establishment and continued management;
- The amount of money the application is seeking from the Trust for establishment and continued management;

- If funding will also come from other places;
- A detailed time line, including key milestones, timing of cash instalments required and when outcomes are expected;
- Details of where the funds are to be paid;
- Who is going to be responsible for managing the process and ensuring all outcomes are met;
- Full disclosure of any funds to be paid/received by you (or a related party/Corporation);
- How the money will be acquitted and reported back to the Trust for review by the Decision Making Committee; and
- Any other information that is useful.

### **What are the steps to apply for the funds?**

- A distribution application needs to be made in writing to the Trustee, Myer Family Company Ltd (Mutual Trust Pty Ltd)
- The Decision Making Committee will consider the application at their next meeting. Note: you may need to be available to present this application in person to the Decision Making Committee at their meeting to provide further information
- The Trustee and the Decision Making Committee will check that the application follows all the rules and requirements
- Depending on the application, the proposal, or the amount of money being asked for; the Decision Making Committee may ask for additional information to be provided
- The Decision Making Committee will impose payment conditions as a precondition to the application distribution being approved
- The outcome of the application (successful or not), will be advised to you in writing

### **What are the steps after funds have been approved?**

- A detailed acquittal form is required to be provided in writing to the Trustee, Myer Family Company Ltd (Mutual Trust Pty Ltd) in line with the original application;
- You may be required to present your acquittal in person to the Decision Making Committee at their meeting to provide further information on how the funds were allocated and the outcomes of the project

# YINHAWANGKA DIRECT BENEFITS TRUST

## BUSINESS APPLICATION DISTRIBUTION FORM

### PRIVACY STATEMENT

The Myer Family Company Ltd (Mutual Trust Pty Ltd) as Trustee of the Yinhawangka Direct Benefits Trust is committed to protecting your privacy and ensuring that all information provided in and arising from this grant application be kept confidential.

The Trustee may need to collect, use and disclose information about the person, the organisation, the project or other relevant people stipulated in this grant application. By signing this statement, consent is given to the Trustee to disclose the information contained in and arising from this grant application to a third party so that the third party is able to assist the Trustee in assessing the grant application. Wherever possible this disclosure will be limited to members of the Trust's Decision Making Committee.

.....  
**Date**

.....  
**Signature of authorised person**

.....  
**Name of authorised person (please print)**

### 1. Contact details of applicant

Please provide the details of the person who will be the point of contact for this application.

Title (Ms, Mr, Dr)

Full Name

Position

Organisation

Address

Telephone

ABN

Email address

Website

**Note that telephone and email will be the primary means of communication by the Trust.**

## 2. Eligibility and costs

(a) Please answer the following general questions:

Would the proposed commencement, operation or expansion of the named Business go ahead without a Trust Funding Distribution?	Yes / No
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Does the applicant organisation have Deductible Gift Recipient status?	Yes / No
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Does the applicant organisation have Tax Concession Charity status?	Yes / No
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(b) What is the overall cost of your proposal?

Answer Here – amount only

(c) How much money are you seeking from the Yinhawankga Direct Benefits Trust?

Answer Here – amount only

## 3. Background about you: please provide your last Annual Report if you have one

(a) What services/programs does the Business deliver and how do they align with the purposes of the Yinhawankga Direct Benefits Trust?

Answer Here

(b) How well placed is your Business to succeed in the proposed commencement / operation / expansion. Please also provide your latest financial statements and any further supporting information showing that you can continue to operate.

Answer Here

#### 4. Business details and sustainability

- (a) Please provide and attach to this application form a detailed report (separate document) describing the proposal, including the following information:
- i. A detailed overview, including when the business will commence / operation or expansion activities proposed from the funding, will take place and duration
  - ii. Details of what the funding will be used to facilitate including deliverables in the short and long term
  - iii. If this application is applying for funding for a business that you currently operate, provide evidence of the outcomes you have achieved to date and the need for funding to continue achieving or enhancing those outcomes
  - iv. Who is going to do the work and what are their qualifications
  - v. What risks of failure can you identify?
  - vi. How will the work continue after the current funding period
  - vii. Any further funding required annually and for what period
  - viii. Information on how you will monitor, evaluate and communicate the outputs/outcomes of the project you are requesting funding for
  - ix. How will you report on how the money has been used (format and regularity)
  - x. Will staff, community and consultants be involved in this evaluation
  - xi. A budget for the proposal in the following form for each year funding is required

#### 5. Payment Conditions

By completing this application form, you acknowledge that pursuant to Clause 6.14 of the Yinhawangka Direct Benefits Trust, the following Payment Conditions apply to any Distribution approved.

- (i) The Distribution is to be used only for the purpose outlined in the Application and approved by the DMC and Council;
- (ii) The Beneficiary must keep appropriate records relating to the use of the Distribution;
- (iii) The Beneficiary must provide to the Trustee all information, records and documents relating to the use of the Distribution as may be reasonably requested by the Trustee from time to time;
- (iv) Upon request of the trustee, provide to the trustee, on or before 30 June each relevant year, or such other time as the trustee determines, a report:
  - a. detailing the outcome of the project, activity or thing;
  - b. comparing the outcome with the objectives of the project, activity or thing as stated in the application made to the Trustee;
  - c. on the satisfaction of any other conditions that were attached to the distribution; and/or
  - d. Containing a certificate by a qualified accountant stating the amount of the distribution spent, or committed to be spent, for the purpose of the distribution.

In the event that that Application relates to a Distribution to a Non-Individual Beneficiary (e.g. an organisation), by completing this Application, the Applicant acknowledges that following payment conditions are applicable and require the recipient of the Distribution must:

- (v) keep appropriate financial accounts and records relating to the use of the distribution to enable:
  - a. All income and expenditure in connection with the distribution to be identified in the recipient's accounts and records; and
  - b. The preparation of financial statements in accordance with Australian accounting standards;
- (ii) provides all information, records and documents as may be reasonably requested by the trustee from time to time; and
- (iii) upon request of the Trustee, provide to the Trustee, on or before 30 June each relevant year, or such other time as the trustee determines, a report:
  - a. detailing the outcome of the project, activity or thing;
  - b. comparing the outcome with the objectives of the project, activity or thing as stated in the application made to the Trustee;
  - c. on the satisfaction of any other conditions that were attached to the distribution; and/or
  - d. Containing a certificate by a qualified accountant stating the amount of the distribution spent, or committed to be spent, for the purpose of the distribution.

## 6. The Budget

Please complete the budget for the total cost of the proposal on a separate document. The budget requires a detailed breakdown of how the Trust's distribution will be spent.

Some examples of items that would be included in the budget are listed below (to be used as a guide, not an exhaustive list)

### **INCOME**

Amount sought from Trust

Cash contribution from the applicant organisation

Confirmed funding from other sources (include letters of confirmation)

Applied for but unconfirmed funding from other sources

Other sources of income relevant to the budget

In-kind contributions (equipment, materials, time and services)

### **TOTAL INCOME**

### **EXPENDITURE**

Capital Equipment (describe)

Salaries and wages (specify payees. Note: you must disclose all benefits you or related parties to you will stand to receive from this project)

Office supplies

Advertising and/or promotion

Travel expenses (specify – accommodation, daily allowances, car hire, etc.)

Other expenses or overheads(specify)

In-kind contributions

### **TOTAL EXPENDITURE**

## 6. Referees

Please provide two referees who are able to comment on your proposed project. *Please include contact name, position, organisation, telephone, mobile and email address.*

Referee 1

Referee 2

## 7. Declaration

I certify that the above application form, attached business summary document and budget of income and expenditure accurately represent a true and fair record of the transactions for this project.

.....  
**Date**

.....  
**Signature of authorised person**

.....  
**Name of authorised person (please print)**