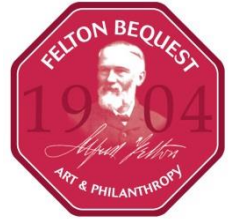


THE FELTON BEQUEST

GUIDELINES



2024 SMALL GRANTS ROUND

The Felton Bequest Small Grants round offers grants of up to \$25,000 for a one-year period only. A total funding pool of up to \$150,000 is usually available.

Applications for small grants are meant to be concise to reduce the preparation required of organisations.

CRITERIA

The following criteria are used to identify applications for recommendation:

- Grants are for projects and initiatives within Victoria only;
- Applications must be outcome driven and address an urgent need for an initiative that should not be delayed;
- Grants are to provide support to small community-based organisations (annual turn-over must be less than \$500,000), where support will have a meaningful impact relative to the overall organisational budget;
- The application should be for a small grant of up to \$25,000, not a contribution towards a larger project;
- Only one submission can be considered per applicant;
- Submissions will not be accepted from organisations that have not successfully acquitted previous grants;
- Submissions will not normally be accepted from organisations that have received a grant in the last two years from The Felton Bequest;
- Where a request is to support the running of an ongoing program, for example employment of a social worker, identify how this position will be sustained after the funding period has concluded.
- In recent times favourable consideration has been given to:
 - Vulnerable children and young people needing supported education and training pathways
 - Helping meet the needs of women and children in health care and access to health care
 - Projects supporting the elderly
 - Projects focused on Indigenous groups and communities
 - Early intervention projects and prevention programs designed to tackle the causes of disadvantage
 - Projects located in rural and regional areas.

SOURCING PROJECTS FOR THE SMALL GRANTS ROUND

The Felton Bequests' Committee (the Committee) is open to applications for funding requests. The benefits of continuing to advertise for applications are:

- The Committee remains accessible to organisations which are responding to needs they have identified by the community;
- There is a formal and equitable channel through which new approaches can be brought to the attention of the Committee;
- The Committee can gain awareness about a range of different projects being conducted in the community;
- There is an opportunity to identify organisations working in spheres of interest; or
- There is an opportunity to assess projects against a broader context of need in the community.

TAX REQUIREMENTS

Tax Concession Charity (TCC) – (formerly referred to as Income Tax Exempt Charity – ITEC)

Deductible Gift Recipient (DGR) Status is NOT required to apply to the Felton Bequest.

DATES AND PROCESS

Opening date: 29 January 2024

Closing date: 12 March 2024

Closing time is 5pm on 12 March 2024. Late applications will not be accepted. Committee meetings are usually held within six weeks of the closing date and outcomes advised to all applicants afterwards.

To submit an application, please do so by following this [link](#).

FURTHER INFORMATION

If you have any questions or require further information, please email us at: charities@eqt.com.au

ABOUT ALFRED FELTON 1831 – 1904

Alfred Felton was born in England and came to Australia in 1853. He was a partner in a successful pharmaceutical company and was an avid art collector. He never married, living for many years in the Esplanade Hotel St Kilda, in rooms crammed with his personal art collection.

In his will, Felton established a charitable foundation. He instructed that his Bequest be placed in the care of a Committee and a Trustee, with annual income to be distributed equally between selected charitable projects that benefit Victorians (particularly those that benefit women and children) and the acquisitions and donation of artworks for the National Gallery of Victoria. Purchases from the art half of the Bequest are now focused on museum quality pieces.

The Felton Bequest is supported by the passion and enthusiasm of members of the Bequests' Committee who have in each successive year since 1904 striven to confer life to Felton's vision.

The Felton Bequest has been responsible for donating 80% of the finest artworks in the National Gallery of Victoria. These are currently valued over \$2.8 billion. These gifts have contributed to establishing the National Gallery of Victoria as an institution of international significance.

Over the past five years, funding of flagship grants has impacted on the number of smaller grants available. Because of this, the Bequest directs funds towards projects that may not appear on the radar of other types of funders.

Furthermore, the Bequests' Committee believes that philanthropy is more than monies given. Members actively explore how they might apply their individual and collective influence, time and expertise towards a higher level of support for their community partners' aspirations.

The will of Alfred Felton directs the Committee that one half of the income from the Bequest is to be applied to purposes that are charitable in a legal sense – with a wish that it be directed towards:

- First, charities for children, for example children's hospitals and orphanages
- Secondly, charities for women such as women's hospitals



- Thirdly, institutions or societies as general hospitals societies for the relief of the educated poor
- Other charitable institutions of a general character.

The Felton Bequest welcomes approaches from all community organisations with Victorian-based projects, particularly those seeking sustainable solutions to complex contemporary needs. Grants can only be made for charitable purposes in Victoria.

THE FELTON BEQUESTS' COMMITTEE

The Felton Bequests' Committee is chaired by Mr Rupert Myer AO

Other members of the Committee are:

- Ms Janet Whiting AM (Trustee Representative, National Gallery of Victoria)
- Ms Carol Schwartz AO (Chair of Equity Trustees)
- Mr Fred Grimwade

Equity Trustees is the trustee of the Felton Bequest and is responsible for managing and administering the fund. Equity Trustees is directed by the Felton Bequests' Committee as to charitable grants and art purchases. Together, the Felton Bequests' Committee and Equity Trustees have made a significant contribution to the Victorian community with respect to the wishes of Alfred Felton.