

THE FRANCES & HAROLD ABBOTT FOUNDATION

GUIDELINES

Application dates

Applications Open on Tuesday 6 April 2021
Applications Close on Tuesday 4 May 2021
Grants announced in late July 2021

ESTABLISHMENT OF THE FOUNDATION

The Frances & Harold Abbott Foundation (Foundation) was established by the Will of prominent Bendigo businessman Harold Athelstane Abbott who died in 1979.

The Foundation has made grants annually since 1983 to support charitable organisations operating in Victoria. Equity Trustees Wealth Services Limited (Equity Trustees) is the trustee of the Foundation and reviews all grant applications.

ABBOTT FAMILY BACKGROUND

Harold Athelstane Abbott, a descendant of one of Bendigo's pioneer families, died in his 90th year on 30 January 1979. Mr Abbott was a member of the Board of Directors of the Sandhurst Mutual Permanent Investments and Building Society and Chairman of Directors of Sandhurst Trustees. He served in World War I during which he sustained permanent injuries.

During World War II he turned inventor and in 1940 the Australian Government accepted an invention of his for use in the Australian Army. This was the anti-tank wire known as "Barblok". Mr Abbott was a prominent businessman who, along with his family, owned and operated the Abbott Supply Company, still in operation today.

GRANT ELIGIBILITY CRITERIA

The Frances & Harold Abbott Foundation invites application for funding between \$5,000 – \$40,000 for organisations that are serving the Bendigo region.

Priority will be given to applications which demonstrate a clear commitment to:

- Community consultation and engagement in the design and delivery of the project or program to support the vulnerable in the Bendigo region
- The provision of equipment and capital infrastructure that will support the vulnerable in the Bendigo region
- Projects or programs which involve collaboration or the development of partnerships between organisations operating in this area

APPLICATION AND REVIEW PROCESS

1. Grant applications may be downloaded from the Equity Trustees website.
2. For any questions prior to making an application email charities@eqt.com.au
3. All applications must be completed online.
4. All applications are reviewed by Equity Trustees.



GRANT CONDITIONS

1. The grantee will use the whole of the grant for the purpose described in the application for the grant and not for any other purpose (the "specified purpose").
2. The grantee will use its best endeavours to expend the monies granted for the specified purpose within twelve months from the date of receipt of the grant ("the specified period").
3. The grantee will advise Equity Trustees as trustee of the Foundation ("the grantor") of any material change which may affect the grantee's ability to direct the monies for the specified purpose.
4. The grantee will keep records adequate to enable the use of grant funds to be checked readily and provide the grantor reasonable access to inspect the grantee's books where reasonably required, including but not limited to complying with the grantor's own audit, tax and compliance obligations.
5. Any payment made by the grantor is made as a gift and is not a financial supply. No GST is payable by the grantor on the payment.
6. The grantee will acknowledge the assistance of the Foundation in any published or display material, and will advise the grantor as to how the grantee proposes to recognise the Foundation.
7. The grantee will provide the grantor a report (in a form approved by the grantor) within two months from the end of the specified period. Where an applicant received a grant in the previous annual distribution but has not provided a report on the previous grant, payment of any new grant may be postponed until a report on the previous grant is provided to the satisfaction of the grantor.
8. Applications will be called for by an advertisement in the *Bendigo Advertiser*, one month prior to the closing date.
9. Late or incomplete applications will not be considered.
10. All applicants are notified of the outcome of their application. Reasons are not provided by Equity Trustees.
11. Equity Trustees will advertise the names of grant recipients in the *Bendigo Advertiser* newspaper.