

## MT BURDETT FOUNDATION

# FUNDING APPLICATION GUIDELINES

### Esperance Community Foundation

## BACKGROUND

The Mt Burdett Foundation (*the Foundation*) was founded in 2019 by Esperance farmer Chris Reichstein, with the intention of establishing an organisation that would invest in initiatives and people to contribute to a vibrant and resilient future for the Esperance region and throughout rural and regional WA.

The Foundation has two branches: the Mt Burdett Rural and Regional Advancement Foundation offering funding throughout rural and regional WA in human capacity building, and the Mt Burdett Esperance Community Foundation offering funding within the Shire of Esperance. Following are the funding guidelines for applications within the Shire of Esperance.

### What we will fund

Applications for funding in the Shire or Esperance can be made to the Foundation for projects falling within the following strategic investment areas:

#### *Healthcare*

To improve the quality of healthcare and the resources available to the healthcare sector, with the intention of ensuring better outcomes for patients and in some cases enabling them to avoid the need to travel for treatment. To leverage funds from Government in order that successful initiatives can be implemented. We only become involved where we can make a unique contribution.

#### *Youth*

To develop well rounded citizens who are able to make a contribution to the Esperance community. To invest in creating an environment and opportunity base in Esperance that supports or entices young people to build their lives and careers within the region. Young people are our future and have a critical role to play in our leadership, both today and in the years to come. 'Youth' is defined by the Foundation as up to 30 years of age.

#### *Education*

To provide education, as a tool that is integral to people of all age groups within the community being able to access opportunity and to break poverty cycles. Initiatives should be carefully targeted to ensure effective impact.

#### *Human capacity building*

To facilitate and drive the development of youth and the wider community. Investments in human capacity building should be targeted across the broad socioeconomic and community spectrum, and all age ranges, in order that the Foundation have an impact throughout the wider community.

#### *Arts and public amenity*

To ensure that Esperance is exposed to visiting performing artists and to the benefits of events and activities that bring the community together. For the creation or improvement of public spaces designed for recreation, entertainment or leisure, that visually enhance a precinct or are designed to

bring people together for social benefit. For space activation and to showcase the natural beauty of the Esperance region, to drive economic development through tourism. The intention is that investment in this area should benefit a broad spectrum of the community rather than a narrow band.

The Foundation prefers to fund projects with measurable outcomes that can demonstrate a lasting impact. If a project is seeking to address an issue, it should be seeking to address the root cause of the issue rather than to provide a temporary solution.

The Foundation will consider applications that have multiple funding partners. We do not set a limit on the level of funding that can be requested.

The Foundation has Deductible Gift Recipient Type 2 (DGR2) status, meaning that the Foundation can only give directly to entities that have Deductible Gift Recipient Type 1 (DGR1) status. If you do not have DGR1 status, we may still be able to fund your project through collaboration with an Auspicing Partner.

### What we won't fund

The Mt Burdett Foundation will assess each project on its merits and its alignment the Foundation's objectives. Please be aware that there are certain types of applications that the Foundation will not consider, including:

- Replacement funding for existing projects
- Projects that duplicate existing services
- Projects of a political nature or purpose

### How projects are assessed

Applications are reviewed based on a set of criteria which forms the basis of the application documentation.

#### 1) Fit of the project with the Foundation

*Assessed on whether the project fits within the five strategic investment areas.*

#### 2) Project delivery

*Assessed on the level of difficulty in delivering the project and the capacity of the project to deliver it.*

#### 3) The impact of the project

*Assessed on the importance of the project, the number of people that will be impacted and what level of impact it will have on individuals.*

#### 4) Value for money

*Assessed on the potential cost of the project, commensurate with the project outcomes.*

#### 5) Portfolio effect

*Assessed on whether the project builds on the Foundation's existing or previous work.*

## APPLICATION PROCESS

Funding applications are made to the Mt Burdett Foundation's Esperance Community Advisory Committee (*Advisory Committee*), a group of volunteers who are appointed by the Mt Burdett Foundation Board. It is the role of the Advisory Committee to review applications and provide recommendations for the Board's consideration.

### When to apply:

Applications are currently being accepted by the Advisory Committee at any time throughout the year.

### How to apply:

#### *Stage 1 - Pitch Paper Review*

- 1) Consider whether your project meets the requirements outlined above.

- 2) Contact a member of the Advisory Committee or the Mt Burdett Foundation Executive Officer to discuss your application and the relevant deadlines for application submission.
- 3) Submit your project Pitch Paper (template supplied). The Pitch Paper is designed to give a basic project outline for initial review. It is suitable for projects in their initial concept phase or those that are fully formed.
- 4) Your Pitch Paper will be reviewed by the Advisory Committee at their next meeting. The Advisory Committee meet at most on a monthly basis. Your Pitch Paper must be received at least one week prior to the meeting that it will be reviewed at. The Foundation's Executive Officer will provide guidance on the meeting schedule and relevant deadlines when you make initial contact.

The Advisory Committee will consider your Pitch Paper and make a decision on whether to invite you to Stage 2 of the application process.

If you are invited through to Stage 2, the Advisory Committee may provide feedback on your initial Pitch Paper that should be taken into account in your Stage 2 Application.

You can expect to be aware of the Advisory Committee's decision within 1-3 weeks of their meeting, depending on the complexity and scale of your project.

#### *Stage 2 - Full Application*

- 1) Complete and submit your Stage 2 Application (template supplied) within the agreed deadline. We will agree on a deadline in collaboration with you to ensure that you have sufficient time to complete the application. It is important that you provide a comprehensive application with all requested information.
- 2) The Advisory Committee will consider your application and make a recommendation to the Mt Burdett Foundation Board on whether to supply funding.
- 3) The Mt Burdett Foundation Board will consider the Advisory Committee's recommendation and make a final determination on your application.

If your application is successful, you will receive an offer of funding. This offer will be conditional on you signing a Funding Agreement with the Foundation that outlines any conditions surrounding your use of the funds, including project reporting requirements.

You can expect to be aware of the Board's decision within 3-6 weeks of your Stage 2 Application submission deadline, depending on the complexity and scale of your project.

## SUBMISSION DEADLINES

Applications are currently being accepted at any time throughout the year. Deadlines for submission of funding applications will be advised on a case-by-case basis when you make initial contact with the Foundation about your project. Deadlines are set based on the availability of the volunteer Advisory Committee to meet.

## APPLICATION DOCUMENTATION

### Round 1

- Project Pitch Paper

## Round 2

- Stage 2 Application Form
- Budget Breakdown Template
- Risk Assessment Template

## CONTACT

If you have questions about the application process or completing the relevant forms, please contact:

Executive Officer

Mt Burdett Foundation

[executiveofficer@mtburdettfoundation.org.au](mailto:executiveofficer@mtburdettfoundation.org.au)