



CAMPBELL EDWARDS TRUST

Funding Guidelines for New Donations

Current at 1 January 2015

ABOUT THE CAMPBELL EDWARDS TRUST

The Campbell Edwards Trust is a perpetual charitable trust that was established in 1922 in Victoria, Australia, by the late Robert Campbell Edwards.

Robert Campbell Edwards, who made his fortune out of tea and property, was dedicated to engendering social change and helping the less fortunate. He left essentially all of his worldly possessions to charity.

Today the Trust assists Australians through the grant of financial assistance to charitable organisations whose programs give effect to the Trust's underlying philosophy, values and vision. Since being founded, the Trust has distributed tens of millions of dollars in donations for charitable purposes in Australia.

The Trust is governed by a board of seven Trustees who manage the Trust assets and distribute its annual income. The Trustees determine the distribution priorities for the Trust income with regard to the wishes of the Trust's founder, Robert Campbell Edwards, and in light of the evolving needs of the Australian community today.

More information about the Campbell Edwards Trust is available from its website at www.campbelledwardstrust.org

TRUST MISSION STATEMENT

The Campbell Edwards Trust is committed to assisting Australians-in-need through the grant of financial assistance to charitable organisations which have programs that grow the key areas in which the Trustees seek to effect change.

For the current financial year, the Trust focus areas are:

- Young people in need of education and other assistance
- Families undergoing conflict
- Those in need of basic human necessities such as food, shelter or clothing
- Indigenous Australians suffering disadvantage
- Support and research services for community challenges
- Religious Education

In order to fulfil its commitment from finite resources, the Trustees focus on areas where there is the highest assessed potential for having an impact and making a difference.

USE OF DONATIONS

The Trust will consider applications for donations that fall within the Trust Mission Statement where the funding is to be used for the following purposes:

1. Donations for specific activities, projects or programs.
2. Donations for general operations, where the value to be added by the funding can be clearly defined and demonstrated.

ELIGIBILITY

The Campbell Edwards Trust will only consider donation requests from organisations that are based or have a registered office in Australia.

Each application will be considered on its merits, however the Trust will NOT consider the following kinds of applications:

1. For or on behalf of individuals.
2. For general fund raising appeals.

FINANCIAL LIMITS

The Trust will currently consider new applications from eligible organisations for a maximum of \$30,000 per annum and a maximum of \$90,000 over three years.

In setting these upper limits, it must be noted that the Trust's preference is that, unless special circumstances exist, donation requests should usually be limited to \$20,000 per annum and a maximum of \$60,000 over three years.

DONATION APPLICATION PROCESS

To make a request for funding:

1. Complete the initial information form (which can be downloaded here www.campbelledwardstrust.org/who-we-support/applying-for-support/)
2. Accompany your request with your most recent annual report and audited financial statements.
3. Email your request to info@campbelledwardstrust.org.

ASSESSMENT PROCESS

When prioritising requests, the Trustees take into consideration:

1. The Trust's mission statement, values and vision.
2. The applicant's demonstrable need for the funds.
3. The use of the funds and the relevant project reach and scope.
4. The impact that the funding would have on the applicant organisation and their work in effecting change in the community.
5. The size of the contribution relative to other financial contribution the applicant typically receives, including from corporate and government sponsors.
6. Organisational effectiveness, including staff and/or volunteers and governance.

KEY DATES

Please note that applications must be made no later than 31 March to be considered by the Trust before 30 June that year.

SHORT-LISTING: Organisations who have been short-listed for funding will receive written notification of the Trustees' decision by email within 2 months after the application date.

If no confirmation of short-listing is received within 2 months after the application date, applicants can assume that the application has been unsuccessful.

FUNDING: The Campbell Edwards Trust accepts applications throughout the year (up to 31 March), however disbursements to successful applicants are in normal circumstances made annually, usually in May, June or July.

You can follow up your status of your application by email to info@campbelledwardstrust.org. However – before emailing - please note the key dates above.