



THE WALTER AND ELIZA HALL CHARITABLE FOUNDATION
Supporting those with health related problems

Judy Lennox Annual Memorial Grant: FY2023-2024 Program Guidelines

**Opening and Closing dates
and times:**

Opening date: Friday, 22 September 2023, 13:00 (AEST)
Closing date: Wednesday, 18 October 2023, 17:00 (AEDT)

Application Platform:

[Walter & Eliza Hall Trust - Online Grant Portal](#)

Enquiries:

If you have any questions, contact the Walter & Eliza Hall Charitable Foundation via telephone on 02 9264 9480 (Mondays and Thursdays only).

Alternatively, you can email info@wehalltrust.org.au (Monday to Friday).

FY2023 – 24 Area of Focus:

Initiatives to improve the social inclusion and participation of people with disability (physical disability focus) in the community.

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1. Introduction

These guidelines contain information for the Judy Lennox Annual Memorial Grant for FY2023-24. You must read these guidelines before submitting an application.

This document sets out:

- the purpose of the grant program/grant opportunity;
- the eligibility and assessment criteria;
- how grant applications are considered and selected;
- how grantees are notified and receive grant payments; and
- how grantees will be monitored and evaluated.

2. About the grant program

The Judy Lennox Annual Memorial Grant has been established to support organisations providing services directly to those living with disability.

The grant program has a strong focus on those living with physical disability, as per Judy's own wishes, reflecting her experience as a person who herself lived with severe physical disability. This grant has been made possible by her selfless generosity.

During her life, Judy often expressed how grateful she was for her own financial independence and the ability that this bought in enabling her to maintain mobility, both through driving her own wheelchair accessible vehicle until aged 80, and through the use of a dependable power wheelchair. Judy often reflected that even with her severe disability her parents were particular to ensure that she received an excellent education, travelled, and learnt to drive – so that she lived a full life as independently as possible.

Judy Lennox passed away in 2011 (aged 83 years) and in line with her wishes, this grant was established to support those living with physical disability.

2.1 Grant amount and grant period

The Judy Lennox Annual Memorial Grant is a one-off funding support, with funding to be utilised/expensed within a 12-month period.

There is no minimum request amount but grant requests cannot exceed \$100,000. Submitting a grant application does not guarantee that you will receive a grant.

3. Eligibility criteria

We cannot consider your application if you do not satisfy all the eligibility criteria.

3.1 Who is eligible to apply for a grant?

This grant opportunity is open to organisations that provide services directly to those living with disability, with a focus on physical disability.

Applying organisations must:

- have an Australian Business Number (ABN);

- be an Australian charity or not-for-profit organisation registered with the Australian Charities and Not-for-profits Commission (ACNC);
- be endorsed as a Deductible Gift Recipient (DGR) and covered by Item 1 of the table in section 30-15 of the *Income Tax Assessment Act 1997*;
- provide their programs and services in Queensland, New South Wales, the Australian Capital Territory and/or Victoria;
- have an account with an Australian financial institution.

3.2 Who is not eligible to apply for a grant?

You are not eligible to apply if you are an organisation that does not meet the criteria in Section 3.1.

3.3 What qualifications, skills or checks are required?

Applying organisations must be able to comply with all child safe checks and practices as well as NDIS Worker Screening Checks, or equivalent depending on the relevant state or territory.

4. What the grant money can be used for

Grant activities must be consistent with the area of focus for FY2023-24: social inclusion and participation.

4.1 Eligible grant activities

Eligible grant activities must directly relate to social inclusion and participation of people with disability, which may include:

- acquiring equipment to better support clients/participants with disability (which become part of the organisation's asset pool);
- program delivery and/or development which specifically address social inclusion and participation;
- working in partnerships with community organisations to identify and develop new, innovative programs;
- working in partnership with Aboriginal and Torres Strait Islander peoples and organisations, e.g., Aboriginal Community Controlled Health Organisations (ACCHOs), to provide a leadership role in activities to improve equity and access, strengthening cultural safety and sustaining community responsiveness to disability.

Organisations should not use grant funding for any activity not agreed upon. If grant funding is utilised for any activity not stipulated in the grant agreement, we may request that grant funding be returned.

If your application is successful, we may ask you to verify program or project costs that you provided in your application. You may need to provide evidence such as quotes for major costs.

4.2 Eligible locations

Proposed programs and projects must take place Queensland, New South Wales, the Australian Capital Territory and/or Victoria.

4.3 Eligible expenditure

You can only spend the grant on eligible expenditures you have incurred for eligible grant activities. Eligible expenditure items may include:

- salaries directly related to the funded project;

- program operational costs;
- the purchase of equipment to support clients/participants with disability; and
- capital works to extend, upgrade or refurbish existing buildings for program delivery.

4.4 What the grant money cannot be used for

Grant money cannot be used to cover facility, operating and/or staff costs unrelated to the grant. Grant recipients cannot use the grant for the following activities:

- activities conducted in areas not mentioned in section 4.2;
- any activity not directly associated with the delivery of grant activities;
- purchase of facilities not directly associated with the delivery of grant activities;
- wages for staff not directly associated with the delivery of grant activities;
- covering retrospective costs;
- costs incurred in the preparation of a grant application or related documentation;
- overseas travel;
- activities that duplicate existing funded activities.

5. The assessment criteria

You **must** address all the following assessment criteria for each element you are applying for in the application. We will assess your application based the criterion below.

Criterion 1: Alignment with Grant Opportunity and Impact

Demonstrate how the proposed activities of your organisation align with the grant opportunity as described at Section 4 of this grant opportunity guideline.

Your response should include details of:

- the proposed geographic location for the grant activities and your rationale for the choice of geographic area;
- your strategy for optimising the impact and/or uptakes of the proposed activities; and
- how the activities will support the grant opportunity.

Criterion 2: Organisational Capacity

Demonstrate the capacity of your organisation to deliver the proposed activities to ensure grant outcomes will be met within the grant timeframe.

Your response should include details of:

- your governance arrangement including your organisational structure;
- accountability mechanisms for delivery of the grant activities; and
- existing workforce and infrastructure for delivery of the proposed grant activities (including evidence of workforce size and experience levels, and the physical and other support facilities that will enable the effective delivery and management of grant activities).

Criterion 3: Efficient and effective use of grant funds

Demonstrate how the proposed activities and budget will provide value for money.

Your response should include details of:

- whole of project costs;
- your organisation's contribution (either in-kind or financial), if applicable, to achieving grant outcomes¹; and
- any co-contributions towards activity costs from other sources.

6. How to apply

Before applying, you must read and understand these guidelines and make an application through our online grant portal.

To apply you must:

- complete the Judy Lennox Annual Memorial Grant Application on the [Walter & Eliza Hall Trust Grant Portal](#);
- provide all the information requested;
- address all eligibility criteria and assessment criteria; and
- include all necessary attachments.

If you find an error in your application after submitting it, you should contact us immediately at info@wehalltrust.org.au or call (02) 9264 9480.

You cannot change your application after the closing date and time.

If we find an error or information that is missing, we may ask for clarification or additional information from you that will not change the nature of your application. However, we can refuse to accept any additional information from you that would change your submission after the application closing time.

6.1 Timing of grant opportunity processes

You must submit an application between the published open and close dates of the grant opportunity. The expected timing of the grant opportunity is detailed in Table 1 below.

Table 1: Expected timing for this grant opportunity

Activity	Expected Timeframe
Assessment of applications	2 - 3 weeks
Notification to applicants of outcomes	Approximately 07 November 2023
Earliest start date of grant activity	01 December 2023
End date of grant activity or agreement	30 November 2024

¹ There are no requirements for organisations to contribute (either in-kind or financial) to achieving grant outcomes. Also, there are no minimum or maximum limits to contributions.

6.2 Questions during the application process

If you have questions relating to clarification of information of the available grant, technical issues or the process during the application period, please contact info@wehalltrust.org.au.

We cannot assist you in addressing assessment criteria, determining eligibility, or completing your application.

7. The grant selection process

7.1 Assessment of grant applications

We first review your application against the eligibility criteria in Section 3. Applications are considered eligible when they meet all stipulated requirements and criteria. This includes your organisations capacity to meet our compliance requirements.

We will rate your application on its merits, based on:

- how well it meets the eligibility and selection criteria;
- how it compares to other applications; and
- whether it provides value with relevant money.

When assessing the extent to which the application represents value with relevant money, we will have regard to:

- the overall objective/s to be achieved in providing the grant;
- the relative value of the grant sought and the indicative budget;
- the extent to which the evidence in the application demonstrates that it will contribute to meeting the objectives and outcomes of the grant opportunity; and
- how the grant activities will target and benefit people with disability within the community.

7.2 Who will assess and approve applications?

The CEO of the Walter & Eliza Hall Group of Charities in the first instance assesses all applications. The full Board of Directors then decides which grant(s) to approve in consideration of the recommendations made by the CEO and the availability of grant funds for the purposes of the grant opportunity.

The Board's decision is final in all matters, including:

- the approval of the grant;
- the grant funding amount to be awarded; and
- the terms and conditions of the grant.

There is no appeal mechanism for decisions to approve or not approve a grant.

8. Notification of application outcomes

We will advise you of the outcome of your application in writing. If you are successful, we will advise you of any specific conditions attached to the grant.

8.1 How we pay the grant

If successful, we will aim to make payments via electronic funds transfer (EFT) on 7th November, the anniversary of Judy Lennox's birthday.

9. How we monitor your grant activity

9.1 Keeping us informed

You should let us know if anything is likely to affect your project or organisation. We need to know of any key changes to your organisation or its business activities, particularly if they affect your ability to complete your grant, carry on business, and pay debts due.

You must notify us of events relating to your grant and provide an opportunity for one of our representatives to attend.

9.2 Reporting

The minimum reporting requirements for the grant are:

- six monthly progress report;
- a final report.

Progress reports

Progress reports must:

- include evidence of your progress towards completion of agreed activities and outcomes;
- show the total eligible expenditure incurred to date, including underspends; and
- be submitted by the report due date.

You must discuss any reporting delays with us as soon as you become aware of them.

Ad-hoc reports

We may ask you for ad-hoc reports on your grant. This may be to provide an update on progress, or any significant delays or difficulties in completing the project.

Final report

At the end of the 12 month grant period, you must submit a final report.

Final reports must:

- include evidence of outcomes;
- include an acquittal of funding expenditure, including information on any underspends;
- be submitted within 30 days of completion; and
- include any relevant information in relation to the future of the project or program.

9.3 Unspent funding

Any unspent funding must be returned to the Walter & Eliza Hall Charitable Foundation.

9.4 Grant variations

We recognise that unexpected events may affect your progress. In these circumstances, you can request a variation to your grant. You should not assume that a variation request will be successful. We will consider your request based on provisions in the grant and the likely impact on achieving outcomes.

9.5 Compliance visits

We may visit you during, or at the completion, of your grant activity to review your compliance with the grant agreement. We will provide you with reasonable notice of any compliance visit.

9.6 Evaluation

We will evaluate the grant opportunity to measure how well the outcomes and objectives have been achieved. We may use information from your application and reports for this purpose. We may also interview you or ask you for more information to help us understand how the grant impacted you and to evaluate how effective the program was in achieving its outcomes.

9.7 Acknowledgement

Approval must be obtained from us prior to making public statements or acknowledgements of our funding.