

Lions Clubs NSW-ACT Save Sight & Health Care Limited

As trustee for:

Lions NSW-ACT Save Sight Foundation

Lions Clubs NSW-ACT Public Health Care Foundation

GUIDELINES FOR APPLICANT CLUBS – ONCE A GRANT IS APPROVED

1. The applicant Club will receive written confirmation from the Foundation's Hon. Secretary advising the Reference Number assigned to the grant (which should be quoted in all future correspondence) showing the name of the Australian Taxation Office endorsed Deductible Gift Recipient that will be the "Grantee", and details of any special conditions that must be complied with for the grant to be finalised. At the same time, the Hon. Secretary will also send copies of the letter to the relevant Foundation Directors and the District Governor concerned to keep them informed.
2. When the grant cheque is drawn it will be made out to an approved Grantee which will be the entity that will either take custody of any item(s), or will be the recipient of the services for which the grant was applied for. In the case of item(s) of equipment intended for the use of a third party beneficiary, the Grantee is expected to make the equipment available to the beneficiary for as long as their need remains.
3. You must contact the Grantee and request they place the order and obtain the relevant Tax Invoice(s) from the supplier(s) of the item(s) or service(s) which should be made out in the name of the Grantee. The Tax Invoice(s) must be fully itemised and clearly show the **GST exclusive cost**. The Grantee effectively becomes the recipient of a donation from the Foundation and is required to fund any applicable GST component which they may then claim back from the ATO on their BAS. **The Tax Invoice(s) (or certified copy) must be forwarded to the Hon. Secretary before the Foundation's cheque can be drawn.**
4. Foundation grants are approved **up to** an amount approved by the Directors and not a fixed figure. If the amount(s) shown on the supplier's Tax Invoice(s) is less than their accepted quote(s), the Foundation's grant will be reduced accordingly. If the reverse is true, the value of the Foundation's grant will not be increased and any extra amount will have to be found by the applicant.
5. All grants are subject to the condition that in the absence of special approval they will be taken up within twelve (12) months of the date of approval, failing which approval will lapse, but the applicant will have the right to reapply.
6. Once everything is in order, the grant cheque will be drawn and forwarded by the Hon. Secretary to the nearest Foundation Director with the aim of presenting the cheque to the recipient in conjunction with the applicant Club. The Hon. Secretary will forward copies of the covering letter that accompanies the cheque to the relevant District Governor and the applicant Club so they are informed that the cheque is ready for presentation.
7. Whilst a grant can only be paid to an approved Grantee, the actual beneficiary may be another approved institution or an individual. This is frequently the case when the grant is for the purchase of sight, medical or health related item(s). Two publicity opportunities often result in this situation and both should be exploited – when the cheque is handed over to the Grantee and when the item(s) are formally presented to the actual beneficiary. The Foundation expects that the presentation(s) be conducted with the best possible publicity advantage to the Foundation, the applicant Club and Lionism in general.
8. It is suggested that the applicant Club, in consultation with the Director, the District Governor and/or the Grantee and actual beneficiary, organise a suitable event (or arrange participation in a suitable event being organised by others) where your Club, the Director and/or District Governor can jointly present the cheque or the item(s) to the Grantee and/or beneficiary. The applicant Club is also expected to ensure that as much publicity as possible is arranged and that a copy of photos and press clippings of the event etc. are sent to the Hon. Secretary for inclusion in the Foundation's records.
9. For ongoing recognition, the Foundation expects you to arrange and pay for suitable identification (e.g. an engraved plate, where practical) to be fixed prominently to the item(s) naming the applicant Club and the Foundation as joint donors. Where the beneficiary is an institution, a framed certificate for display in their premises and/or acknowledgement on their Honour Board should also be arranged.
10. For further information and assistance, do not hesitate to contact any of the three Foundation Directors representing your District. Their details can be found under your District listing in the current Lions Australia MD 201 Directory.