

**Lady Bowen Trust  
Grant Round – 2019**  
**Information and forms for organisations wishing to apply for funding**

**1. Background**

The Lady Bowen Trust is an independent charity dedicated to assisting Queenslanders who are homeless and have complex individual needs to achieve safe and secure shelter and build a better future

The Lady Bowen Trust will be determining grants for organisations to provide practical support to enable people who are homeless, or who have a history of homelessness, to transition to stable accommodation that improves their circumstances and personal well being. Grants will not be provided for crisis or emergency accommodation (as other funding sources are available for this purpose).

Approximately eight grants of up to \$15,000 per organisation will be available. Applications will be initially made via Expression of Interest. Further information may be requested from short-listed organisations.

Expressions of Interest must be received by 5pm on Friday 10 May 2019. Organisations should ensure they review the Lady Bowen Trust funding criteria before submitting an Expression of Interest. Application forms and criteria are available from the Lady Bowen Trust website at [www.ladybowentrust.org.au](http://www.ladybowentrust.org.au) or from the Lady Bowen Trust secretariat on 1800 081 698 or email:enquiries@ladybowentrust.org.au.

**2. Eligibility**

Eligible organisations are those that:

- Provide assistance to people experiencing homelessness, or who have a history of homelessness, and who are in necessitous circumstances in Queensland; and
- Have Designated Gift Recipient (DGR) status as determined by the Australia Taxation Office.
- Have completed reporting requirements to the satisfaction of the Board of Advice of the Lady Bowen Trust if they have previously received funds from the Lady Bowen Trust.

Eligible proposals are those that:

- Meet the criteria outlined in the Lady Bowen Trust disbursement guidelines (see separate Lady Bowen Trust Disbursement Guidelines document);
- Can demonstrate that Lady Bowen Trust funds will not be utilised where other funding sources are available and could be applied (Lady Bowen Trust funds will not be granted to provide for crisis or emergency accommodation);
- Can demonstrate that Lady Bowen Trust funds will be applied directly to achieve beneficial outcomes for people experiencing homelessness, and will not be directed to organisational resources (including salaries); and
- Have no expectation of receiving ongoing/recurrent funding.

**All organisations providing services to assist Queenslanders who have experienced, or who are at risk of homelessness, are encouraged to consider submitting an Expression of Interest. As funds are limited, the Board of Advice has identified priority for funding will be organisations providing services and support to the following groups of people experiencing or at risk of homelessness:**

- **Organisations providing assistance to Queenslanders experiencing homelessness, or at risk of homelessness due to natural disasters occurring during 2018/2019**
- **Indigenous Queenslanders experiencing homelessness**
- **Young Queenslanders experiencing, or at risk of, homelessness**
- **People who have experienced domestic or family violence**
- **Older women who are experiencing, or at risk of, homelessness.**

Funds will not be granted to contribute to building or property acquisition funds, the development of capital, for salaries, or to undertake training, research or business development.

Recommendations in relation to the allocation of funding will be determined by a sub-committee of the Board of Advice of the Lady Bowen Trust. These recommendations will then be endorsed by the full Board of the Lady Bowen Trust and advised to the Public Trustee of Queensland for approval.

Upon receipt of funding, organisations will be required to commit to a funding agreement and provide regular reports to the Lady Bowen Trust until funds are deemed, by the Board of Advice and the Public Trustee of Queensland, to have been successfully acquitted.

### **3. Application process**

The application process will be undertaken as follows:

- Eligible organisations must submit an Expression of Interest (EOI) using the attached EOI form by 5.00pm on Friday 10 May 2019.
- All organisations will receive acknowledgement of receipt of their submission by Friday 17 May 2019.
- If short-listed, the Lady Bowen Trust will follow up with organisations for any additional information that may be required.
- Successful organisations will be advised by end July 2019.

#### **4. Submitting Expressions of Interest**

Any queries relating to the application or Expressions of Interest process should be addressed to the Secretariat, Lady Bowen Trust, GPO Box 690, Brisbane 4001, by calling 1800 081 698 or via email to [enquiries@ladybowentrust.org.au](mailto:enquiries@ladybowentrust.org.au).

Expressions of Interest may be submitted via email or hardcopy. If submitting in hard copy, please provide the original plus one additional copy. Hard copy applications should be stapled only. Please do not bind these applications.

Please submit your Expression of Interest to:

The Secretariat  
Lady Bowen Trust  
GPO Box 690  
BRISBANE QLD 4000  
Email: [enquiries@ladybowentrust.org.au](mailto:enquiries@ladybowentrust.org.au)

**Expressions of Interest must be received by 5pm on Friday 10 May 2019. No extensions will be granted.**



**Lady Bowen Trust  
2019 Expression of Interest cover sheet**

**You must provide the original and one full copy of the Expression of Interest (EOI) document, including completing the EOI checklist.**

**Tax status : You must provide certification from the Australian Taxation Office (ATO) that shows the ATO has endorsed your organisation's Deductible Gift Recipient (DGR) tax status. Failure to provide this certification will result in your Expression of Interest being deemed ineligible for funding.**

<b>Name of organisation:</b>		<b>ABN:</b>
<b>Postal Address</b>		<b>Tel:</b>
<b>Street Address</b>		<b>Fax:</b>
<b>Contact person:</b>		<b>Tel:</b>
<b>Position:</b>		<b>Email:</b>
<b>Name of the project/purpose for which you are seeking a grant:</b>		
<b>Brief description of project/proposal (30 words or less):</b>		
<b>Amount (\$) being requested (GST exclusive)</b>	<b>Total budget for the project (if additional funding sources are involved)</b>	
<b>Total budget for your organisation (current financial year)</b>	<b>Total number of pages of your Expression of Interest</b>	

I, (insert full name) \_\_\_\_\_ am authorised by

(organisation name) \_\_\_\_\_ to make this application on its behalf and warrant that all information provided in this application is true and correct. I have read the terms and conditions relating to the application for a grant from the Lady Bowen Trust, including the Privacy Statement and Consent to Use of Personal Information, and agree to those terms and conditions.

Signature and date: \_\_\_\_\_

## Expression of Interest checklist – Lady Bowen Trust

**This checklist is intended to assist you to lodge a complete Expression of Interest for consideration by the Board of Advice of the Lady Bowen Trust. Please complete and sign this checklist and attach a copy behind your application cover sheet. Your Expression of Interest will not be accepted if it is not accompanied by this application checklist.**

Have you read the “Lady Bowen Trust Grant Round 2019 Information and forms for organisations wishing to apply for funding” guidelines?	Yes	No
Have you read the Privacy Statement detailing how the Lady Bowen Trust uses and stores the information you provide?	Yes	No
Have you read the Lady Bowen Trust Disbursement Guidelines?	Yes	No
Does your funding request fit the Lady Bowen Trust Disbursement Guidelines?	Yes	No
Does your funding request assist people who have been homeless to transition to more stable or secure accommodation?	Yes	No
Is your funding request for a project or proposal that does not require an ongoing (recurrent) financial commitment from the Lady Bowen Trust?	Yes	No
Have you included a copy of your DGR (Deductible Gift Recipient) documentation?	Yes	No
Have you included a response to each item under the project information and organisation information requested in the Expression of Interest form?	Yes	No
Has an appropriate representative of your organisation (such as the Chair of your governing body or the executive officer) signed the application cover sheet?	Yes	No
If submitting your application in hardcopy, have you included the original and one copy of all information and documentation requested, and ensured that it is stapled (not bound)?	Yes	No
Have you included an email address and contact phone number to enable acknowledgement of receipt of your submission and to follow up if any further information is required?	Yes	No

All submissions will be acknowledged. If you have not received an acknowledgement of your application by 17 May 2019, please phone 1800 081 698 or email enquiries@ladybowentrust.org.au.

Signed by \_\_\_\_\_ Date: \_\_\_\_\_

## **Lady Bowen Trust Expression of Interest details required**

We welcome short, succinct proposals that respond clearly and thoughtfully to each item. In your Expression of Interest, please provide a response to each of the following items:

### **Part A**

#### **Project/proposal information required (2 pages maximum - minimum 10 point font)**

- Brief overview of the project/proposal. State the expected dates of commencement and completion.
- Specify the location where the project/proposal will be conducted.
- Define the aims of the project/proposal and how you will achieve these.
- Define the target group that you wish to assist. Provide quantitative data if possible regarding the number of people that you wish to assist.
- Explain the need that will be addressed and why this is important.
- Describe the specific outputs/deliverables the project/proposal intends to achieve.
- Describe the impact /outcomes you expect your project/proposal to achieve.
- Provide evidence of your organisation's capability and expertise to deliver this project/proposal.
- List any other organisations (including trusts, foundations, corporations and other sources, including governments) from which you are seeking funding for this project/proposal.

### **Part B**

#### **Organisation information required (2 pages maximum– minimum 10 point font)**

- Provide a brief description of the history and purpose of your organisation.
- List the characteristics of the population that your organisation serves, for example geographic location, age and/or cultural background.
- Summarise the current programs and accomplishments of your organisation.
- Provide a list of your board of directors.
- You must provide copies of documents that show that the Australian Taxation Office (ATO) has endorsed your organisation with Designated Gift Recipient (DGR) status.

The Lady Bowen Trust may request further information in addition to the above information to assist the Board of Advice to assess your request for funding.

## **Lady Bowen Trust Privacy statements and consents.**

### **Collection of personal information**

In your application to the Lady Bowen Trust for a grant, your organisation (the applicant) may provide the Lady Bowen Trust with contact details and other personal information about directors and other key personnel (individuals). In the future, the Lady Bowen Trust or the Public Trustee of Queensland and our researchers and advisors may obtain other information about the individuals from the applicant, from any of them, or from other sources. We may collect “sensitive information” but only when it is necessary for the purpose of the application. This is “personal information”.

### **Use of personal information**

We use personal information for the primary purpose of assessing the applicant’s application, and if it is successful, to provide a grant to the applicant.

We may also use personal information for our internal operations including accounting, record keeping, archiving, compliance monitoring and compliance with legislative and regulatory requirements.

Without some or all of your information, we might not be able to process your application.

If your application is unsuccessful, we may hold personal information we collect for our records. If your application is successful, after the grant is completed we may hold personal information concerning the grant for our records.

### **Disclosure of personal information**

We may disclose personal information for the purposes set out above, to people and organisations who carry out functions for us, for example the Public Trustee of Queensland, or the Department of Housing and Public Works. We may also disclose information to any person you authorise, your legal advisers, any party to whom we are authorised or required by law to disclose the personal information to, and any party to whom the holder of the personal information we hold authorises us to disclose it.

### **Data quality**

We will take reasonable steps to make sure that the personal information we collect, use and disclose is accurate, complete and up to date.

### **Access and correction to personal information**

Subject to exceptions permitted by law, an individual may obtain access to the personal information we hold about them by contacting the Trust at the address set out below. An accessing fee may apply. If we are informed by an individual that the personal information we hold about them is not accurate, complete or up to date, we will take reasonable steps to correct it.

### **Informing individuals**

You must inform each individual of the contents of this statement and consent. By signing the application for a grant, you acknowledge you are aware of this statement, and on behalf of each individual, consent to sensitive information being collected if it is necessary for the purposes of the application.

## **Disbursement of funds from the Lady Bowen Trust – Eligible items and reporting requirements**

### **1. Purpose**

This document outlines the items eligible for funding by the Lady Bowen Trust and the reporting requirements and timelines required of service providers receiving funds from the Trust.

### **2. Service Delivery Summary**

The Lady Bowen Trust is an independent charity dedicated to assisting Queenslanders who are homeless, who have complex individual needs and who are in necessitous circumstances to achieve safe and secure shelter and build a better future.

The Lady Bowen Trust partners with charitable organisations (service providers) to provide practical assistance to support people who are experiencing, or at risk of homelessness, to stabilise their lives and achieve sustainable housing.

The extent and nature of the assistance required will vary between clients, with a key determinant being their accommodation options.

To ensure its effectiveness, financial assistance from the Lady Bowen Trust will be based on the individual client assessments, performed by the service provider for each client, and will form part of their case management plan.

The Trust may provide funds only to organisations who have current Designated Gift Recipient status from the Australian Taxation Office. The Trust is not able to provide funds directly to individuals.

### **3. Service Delivery Principles**

All people, regardless of background or circumstance, have the right to belong to a safe and stable home, with equal opportunity to participate in and contribute to community life.

On this basis, the principles upon which assistance should be provided are:

- The Trust is focussed on breaking the cycle of homelessness for people most at risk.
- Trust funds will be used for items or expenses that assist a person who is homeless, and in necessitous circumstances, to transition to more stable housing and to sustain their tenancy.
- Funds can only be used when linked to achieving desired, and potentially sustainable housing outcomes, identified by a service provider in a client's case management plan.
- Items/services will be purchased or procured on clients' behalf by the selected service provider. Cash will not be given to clients. Where store cards are purchased, these must be limited to ensure appropriate use.



- Clients can be assisted more than once in recognition that some may not successfully transition to longer term housing the first or even subsequent times.
- Trust funds should not be used to duplicate products or services available from other sources.
- As Trust funds are limited, the selected service provider will ensure value for money on expenses and balance this with achieving the desired outcomes for clients.
- Assistance must be tightly targeted to ensure it supports clients.
- When choosing the type of assistance to provide, the service provider must ensure that no perceived or actual conflict of interest arises by choosing products delivered by its own agency.

As available funds are limited, the Trust may occasionally identify priorities for the distribution of funds.

#### **4. Use of Funds of the Lady Bowen Trust**

Eligible persons are persons who are experiencing chronic homelessness, or who are at risk of homelessness and are in necessitous circumstances, and for whom the service provider has developed a case plan where items/expenses have been identified that will assist them to move into more stable accommodation.

Items/expenses eligible for Lady Bowen Trust funds must relate to:

- What people who have been homeless and in necessitous circumstances need to get into accommodation and establish themselves (as might be detailed in a “move-in plan”)
- What people who have been homeless and in necessitous circumstances need to sustain their tenancy (eg. Tenancy support issues to prevent tenancy breakdown)
- What people who have been homeless and in necessitous circumstances need to achieve a transition from short-term accommodation to long-term accommodation.
- As the Trust is created to assist people with high and complex needs, there is no funding limit set per client or per type of assistance (except in identified specific cases).

##### **4.1 Ineligible Items**

To sustain the Trust funding, purchasing of personal care services for individuals (e.g. To pay for carers or domestic help) is not permitted. Trust funds cannot be used to reimburse expenses already incurred, or for costs incurred in traffic accidents or traffic or parking infringements.

#### 4.2 Eligible Items

Funds will only be used for purposes in accordance with the Trust's service delivery principles and listed eligible items. Appropriate reporting and accountability mechanisms must ensure that Trust funds are spent effectively and equitably.

Funds may be used to meet the following needs:
Clothing, footwear and personal hygiene items
Housing establishment costs when these cannot be met through mainstream programs, such as assistance with: <ul style="list-style-type: none"> <li>• Moving expenses</li> <li>• Utilities connection</li> <li>• Essential furniture and white goods where the provision of such is a prerequisite to housing the client and no other acceptable option is available</li> <li>• Home modifications not funded through existing programs.</li> </ul>
To access life skills training and development that assists in achieving a sustainable housing outcome. For example, budgeting or cooking skills, or driving lessons for young people, where these lessons will assist with sustaining employment or training.
Health needs that can't be met through mainstream programs or from health agencies. This may include: <ul style="list-style-type: none"> <li>• Medication</li> <li>• Minor medical equipment</li> <li>• Therapeutic interventions</li> <li>• Dentistry</li> <li>• Podiatry.</li> </ul>
Transport costs for a limited time period (for example, to access essential services). Such costs are more likely to be a one-off need.
Storage costs for a limited time period.
Relocation costs to 'go home' (particularly in the context of Indigenous clients).
Social inclusion activities to enable clients to participate in social and economic life upon initial arrival in a new location/home including: <ul style="list-style-type: none"> <li>• Assisting clients to identify with their new local community, reintegrate into social networks, and participate in community life. This maximises the chances of a client succeeding in stable accommodation.</li> <li>• Linking a client with local support services or community networks.</li> <li>• Funds should not be used for ongoing activities.</li> </ul> <p>A maximum of \$500 can be used for this purpose.</p>
Time limited specialist support: Purchasing counselling sessions for issues preventing a person from addressing their housing needs Child care (short-term) – that is linked to housing outcomes for the client.

## **5. Future Development**

The above list is by no means expected to cover every possible client need in the future. It is anticipated that occasionally, other options may be identified for the use of Lady Bowen Trust funds.

The selected service provider is expected to make daily decisions regarding the appropriate application of Trust funds to meet clients' needs, based on the above service delivery principles, and the list of eligible items. If it is unclear if an item meets the requirements for the use of trust funds, the selected service provider must submit a request to the Board of Advice requesting a determination. This form is available from the Secretariat of the Lady Bowen Trust.

The Board of Advice of the Lady Bowen Trust will base decisions regarding additional eligible items on meeting the objectives of the Trust, and The Trust's service delivery principles.

## **6. Reporting Requirements**

### 6.1 Requirements of Service Providers

The Board of Advice of the Lady Bowen Trust is required to report to the Public Trustee of Queensland regarding the use of Trust funds.

As a result, service providers must report to the Board of Advice of the Trust regarding the expenditure of funds in the format specified.

Reports must be provided, at least quarterly, prior to each meeting of the Board of Advice. Failing to report as required may be cause for the Board to recommend that the service provider no longer be considered eligible for funding.

Reports from the service provider will be an important focus of Board of Advice meetings. The report provides an opportunity to affirm to the Board of Advice that the Trust funds are making a difference in assisting Queenslanders who have been experiencing homelessness to transition to more stable housing arrangements. The report also provides the service provider with an opportunity to present issues and draw the attention of the Board of Advice to possible unmet needs.

Providing the report, with appropriate details of funds expenditure, to the Board of Advice, together with acceptance of the report by the Board of Advice, is considered adequate acquittal by the Trustee. The Board will advise the service provider within fourteen (14) days of a Board of Advice meeting if the Board has any queries regarding the report or requires any further information. A copy of the submitted report may be forwarded to the Public Trustee's Office with the minutes of each Board meeting.

The Board of Advice reserves the right to amend the details required to acquit the disbursement of funds. The Board of Advice will provide fourteen (14) days notice to the service provider of any amendments to the reporting requirements.

## 6.2. Timing of Reports regarding use/disbursement of funds

Reports detailing disbursement of funds must be received no later than fourteen (14) days prior to the scheduled meeting of the Board. Final acquittal reports, including detailed demographic information, must be received no later than 12 months after the funds are provided to the organisation, unless agreed to by the Board of Advice.

Organisations that have received Lady Bowen Trust funds will be advised of the dates reports are required by the Board of Advice at the start of each calendar year.

Should dates of meetings change, or if the Board of Advice requires additional information, the Secretariat will advise service providers, with a minimum of 14 days notice, to provide the requested information.

## 6.3 Report content

Quarterly reports from the service provider to the Board of Advice must include:

- Number of people receiving assistance with funds from the Lady Bowen Trust
- Criteria for determining prioritisation in allocating funds
- Total amount of funds spent in the quarter
- Copies of receipts for items over \$100
- List of the number of clients and kinds of assistance for items/expenses under \$100
- Intended use of any unspent funds and any funds that have been carried over from the previous quarter
- Where possible, case studies detailing how the assistance provided has assisted individual recipients is desirable.

For each person receiving assistance:

- Type of assistance provided
- Amount of funds spent (identified by type of assistance) as specified in the Service Delivery Principles, Use of Trust Funds and Eligible Items
- Multiple instances of assistance (where the same client receives repeat assistance)
- Demographics – gender, age, household type, Indigenous status, ethnicity, disability, dependencies.
- Outcomes for clients:
- Qualitative feedback where possible
- Identification of any unmet needs that the Trust may be able to address
- Issues or comments.

Information included in the report must comply with applicable privacy legislation and must not contain data that could identify recipients.

The report must be signed as accurate by an appropriate delegate, as identified by the service provider, and notified by the service provider to the Lady Bowen Trust.

A suggested report format appears as **Attachment A** to this document.

## **7. Further information**

For further information please contact:  
Lady Bowen Trust  
GPO Box 690  
BRISBANE QLD 4001  
Phone: 1800 081 698

Email: [enquiries@ladybowentrust.org.au](mailto:enquiries@ladybowentrust.org.au)

Document current as at 14 February 2019

Prepared by:  
Lisa O'Donnell  
Secretariat, Lady Bowen Trust



Attachment A: Suggested report format

Report to the Board of Advice, Lady Bowen Trust by (name of service provider) regarding disbursement of funds as at (date of report)

**1. Background**

Date of receipt of funds  
Amount received

**2. Details regarding expenditure**

Number of people receiving assistance with funds from the Lady Bowen Trust  
Criteria for determining prioritisation in allocation of funds  
Copies of receipts for items over \$100  
List of number of clients and kinds of assistance for items/expenses under \$100  
Total amount of funds spent in the quarter  
Intended use of any unspent funds and any funds carried-over

**3. Profile of those assisted**

Type of assistance provided  
Amount of trust funds spent (identified by type of assistance) as specified in the Service Delivery Principles, Use of Trust Funds and Eligible Items.  
Multiple instances of assistance (e.g. Where the same client receives repeated assistance)  
Demographics – gender, age, household type, Indigenous status, ethnicity, disability, dependencies.

(Note: Information included in the report must comply with applicable privacy legislation and must not contain data that could identify fund recipients.)

**3. Outcomes for clients**

Qualitative feedback where possible

**4. Identification of any unmet needs that the Lady Bowen Trust may be able to address.**

**5. Issues or comments**

**6. Service provider contact for queries or further information**

**8. Signed by:**

Authorised delegate  
Service Provider  
Date