

## Nancy Shelley Bequest Fund Application form

### Background to the Fund

The Nancy Shelley Bequest Fund (NSBF) is a pool of money made available to Blue Mountains Local Meeting (NSW Regional Meeting) as a generous bequest from the late Nancy Shelley, a worshipper with Blue Mountains.

The guidelines for granting money from the fund, as discerned by the Blue Mountains Local Meeting, and in keeping with Nancy Shelley's specific interests, are to make it available for groups or individuals working for:

- ❖ Peace concerns
- ❖ Indigenous concerns
- ❖ Women’s education, particularly in the areas of mathematics and music
- ❖ Concerns of the local Blue Mountains meeting
- ❖ Some Yearly Meeting concerns.

Applications can only be put forward by members or attenders of Blue Mountains Local Meeting. People outside of the local meeting need to approach a local meeting Friend (who may be the Clerk, email below) to make an application on their behalf. Applicants will have the opportunity to discuss their proposal with the NSBF Management Committee, should they wish.

Applications will be considered for funding up to \$5,000 for individuals and \$10,000 for organisations. In exceptional circumstances larger amounts may be considered.

Decisions regarding the granting of funds will initially be made by the NSBF Management Committee, who will then take the proposal to Blue Mountains Local Meeting for final approval.

Please refer to the website (<https://www.quakersaustralia.info/organisation/local-meetings/blue-mountains-local-meeting>) for application deadlines. The NSBF Management Committee meets approximately 4-6 times per year. The Committee may choose to consider urgent requests at other times.

To submit an application or make an enquiry, please email the Blue Mountains Local Meeting Clerk at [wmbuemountains@quakersaustralia.info](mailto:wmbuemountains@quakersaustralia.info). The Blue Mountains Local Meeting Clerk will forward your enquiry or application to the Committee.

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### APPLICATION

Name and contact details of person or group submitting the application for funding

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Name of the Blue Mountains Friend you are submitting your application through

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Which of the areas listed above does the request relate to? (please indicate)

- ❖ Peace concerns
- ❖ Indigenous concerns
- ❖ Women’s education, particularly in the areas of mathematics and music
- ❖ Concerns of the local Blue Mountains meeting
- ❖ Some Yearly Meeting concerns.

What amount is being requested? .....

Please summarise what the funds are required for. Please include a timeframe for the proposed activity/project.

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What date do you anticipate the project being complete? .....

We welcome attachments which will explain your project further.

**IF YOUR APPLICATION IS SUCCESSFUL**, you will be notified by the Committee convenor and the funds will be paid into your account.

**How would you like to be notified?**

- ❖ Email .....
- ❖ Phone .....
- ❖ Other .....

**How would you like to be paid?**

Cheque

- ❖ Name and postal address .....

**OR**

Direct deposit

- ❖ BSB .....
- ❖ Account number.....
- ❖ Account name .....

## **PROJECT COMPLETION REQUIREMENTS**

1. A financial statement will be required on completion of the project. If all of the funds are not used, you will be asked to contact the NSBF committee to discuss whether the balance needs to be returned to the fund.
2. A written report (or, where appropriate or feasible, a verbal report to Blue Mountains Local Meeting) will be required within three months of the completion of your project.

### **For your assistance**

*It may be helpful to consider the checklist below to ensure you have given the Nancy Shelley Bequest Management Committee sufficient information to discern right use of the funds. Not all the questions will be applicable to every project or concern; they are intended only as a guide.*

### **If yours is an application for an individual leading, or small project:**

1. Have you clearly indicated the purpose of the grant?
2. Have you identified how the outcome will align with Quaker values, or how it will enhance a current Quaker concern which is in keeping with Bequest terms of reference?
3. Have you specified how much money you are asking for?
4. How will you know if your purpose has been achieved? Have you listed your success measures, whether quantitative or qualitative?
5. Do you have a clear sense of how long your leading or project will take, and does it have milestones or review points?
6. What proportion of the funds you are requesting will be spent on which elements of the project (e.g. 60% travel reimbursement, 40% course attendance, etc.)? Please specify exact dollar amounts where known.
7. Have you allowed time to analyse and report on your success? What type of report will be most appropriate for your project / concern and of most use to other Friends? Will there be learnings for others in the future? How will these be communicated most effectively? *Reporting back is a requirement for all grant recipients.*

### **If this is an application for a group or organisation, or larger project:**

All the above apply. In addition, it may be helpful to consider the components of your project plan, e.g.:

#### **1. Goal, objectives / Purpose and outcomes**

State the objectives of this project (objectives should be stated in measurable terms whenever possible).

#### **2. Total funding requested (round figures)**

Dollar terms if possible. Indicate here any other funding or sponsorship in kind. Detail should be provided in the funding section below.

#### **3. Background information**

- a. Describe the problem or issue, which the project is designed to overcome. Explain how the problem arose.
- b. Describe the area where the project will be located, including its socio-economic status.

- c. Describe the target groups/beneficiaries and their needs, the cause of their needs. Describe the relationship of those needs to the goal.
- d. Explain the reason for undertaking this project. How will this project help solve the problem?
- e. Are there any similar activities being conducted by government or others to address the problem?

#### **4. Project implementation**

- a. What stakeholder consultation is appropriate, and how will it be done?
- b. Success measures: list expected outputs and performance indicators used to measure the outputs.
- c. Provide an implementation schedule for the project. This should include the components/tasks to be carried out to achieve the outputs, the inputs required (personnel, equipment, training, etc.), and identify any milestones.
- d. Explain how this project will benefit the target beneficiaries (both direct and indirect beneficiaries). What other benefits can be expected as a result of this project?
- e. How will the outcome of the project be sustained over time? If relevant, how will the ongoing costs be covered?

#### **5. Project management**

- a. Are you employing anyone in your project, and if so, have all legal requirements for employers been considered and identified? Do you have appropriate insurance, including public liability? This should be specified in detail.
- b. Identify any risks entailed in implementing the project, and your proposed risk mitigation strategies.

#### **6. Funding (detail)**

- a. Specify the amount of funding requested, and any other funding or contributions in cash or in kind.
- b. Provide a breakdown of the costs required to undertake the activities. Describe how these costs have been calculated (e.g. on the basis of quotes).
- c. Has the proposal also been or will be submitted to other donors? Is this activity a part of, or being implemented in conjunction with, any activity funded by others?

#### **7. Evaluation and reporting**

- a. How will the project be monitored, managed, and appropriately reported?

***The Committee welcomes applicants whose leadings or projects do not fit neatly into the above guidelines. Please feel very welcome to discuss your application with a member of the Committee or another member of Blue Mountains Local Meeting.***

*'Dearly beloved Friends, these things we do not lay upon you as a rule or form, but that all ... may be guided ...for the letter killeth, but the Spirit giveth life' (1656)*