



Charitable Objects Fund

Information Pack



RSL
Queensland

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A. GUIDELINES

1 Background and purpose

The Charitable Objects Fund (the Fund) was established with the primary purpose of providing charitable and welfare support to the veteran community and their families. Funds are allocated equally across the 10 Districts each year.

Additionally, the Fund is available to support activities associated with other Objects of the League.

These guidelines have been clarified for ease of interpretation as a result of a 2022 internal audit.

2 General

In accordance with the mission of RSL Queensland, the Fund should be used to provide for care, commemoration, and camaraderie endeavours to enable veterans and their families to live with dignity and respect.

Other sources of external funding e.g. Department of Veterans Affairs (DVA), Government agencies, grants and community support avenues should be considered first, otherwise the request for assistance from the Fund may not be approved. Refer to section D for available external grants.

a. Guidelines

- (1) The distribution of the Fund is solely at the discretion of Districts on application using the application form or digitally on SKIP.
- (2) A Sub Branch should ensure the request for assistance aligns with and has a specific and verifiable link to one of the Objects of the League.
- (3) Sub Branches may be required to also contribute funds to the activity, as determined by the District.
- (4) Funding by Districts should be allocated with the aim of distributing a minimum of 60% for Veteran Welfare, defined by ACNC (Australian Charities and Not-for-Profits Commission) as:

“the provision of or access to service for veterans and their families who are socially disadvantaged or in need. It involves supporting social, emotional, and

physical needs, as well as helping with the basic needs of shelter, food, medical care, and education”.

- (5) Direct financial support (including for payment of funeral expenses) to veterans and their families may require consideration of financial hardship.
- (6) Funds provided to Sub Branches and Districts must be acquitted quarterly, by the end of the following month.
- (7) The District President may approve the release of funds in the event of an emergency, to the value of \$5,000 (including GST) and must seek District Committee ratification at the next meeting.
- (8) If there is doubt whether applications conform with these guidelines, the District Board should seek advice from RSL Queensland – League Support Services (LSS).

3 Activities meeting the guidelines

a. Veteran welfare and support:

The services of RSL Queensland Service Delivery and the Department of Veteran Affairs should be considered before applying for assistance from the Fund. Examples of some of the activities the Fund may be used for, and which align with the Objects of the League are:

- (1) Provision of financial or general assistance or support to veterans or their families in need or at risk.
- (2) Assistance to veterans or their families to fund services to provide safe or secure accommodation e.g. repair of a veteran’s premises.
- (3) Visits to sick veterans and their families at home or in hospital, or to assess their needs.
- (4) Collaboration with other Sub Branches and ESOs to co-design programs and activities that support the veteran community.
- (5) Assistance with costs to run programs during Veterans’ Health Week in promotion of veteran good health and well-being.
- (6) Assistance to veterans and their families to attend relevant appointments or activities, where they are unable to afford the transport or are infirm or otherwise unable to arrange transport.

- (7) Training of Sub Branch members and volunteers to assist in their welfare activities including the Advocacy Training and Development Program, mental health and first aid training for Districts or Sub Branches officers, as required for operational requirements and suicide awareness.
- (8) Provision of reasonable medical aids which enhance health, safety or well-being of veterans or the veteran community, particularly where an individual would not be otherwise able to afford the medical aid.
- (9) Activities to assist the integration of veterans and their families into community activities and civilian life to reduce social isolation and promote social connectedness.
- (10) Reasonable costs of hosting a Christmas function for veterans and volunteers.
- (11) Reasonable costs associated with funeral services, capped at \$7,500 (including GST).
- (12) Headstones for unmarked graves, capped at \$2,500 (including GST) per headstone.
- (13) Memorial boxes for Poppy Services.

b. Commemorative events:

- (1) Reasonable costs related to significant commemorative events.

“A significant commemorative event is an activity or celebration that marks a special occasion or milestone and is intended to honour and remember a person, group, or event of significance to the Defence family, including:

Memorials: *contributing to the building or maintaining of appropriate monuments or memorials or burial places dedicated to preserving the memory of a particular person, group, or event.*

Anniversaries: *celebrations marking the passing of a specified number of years since a significant event.*

Commemorative ceremonies: *formal events like Anzac Day or Remembrance Day ceremonies, held to commemorate important Defence events.”*

These activities are important because they serve as a way for us to reflect on our shared Defence history and heritage and to pay respect and tribute to those who have made significant contributions. See Object 4 of the League.

- (2) Purchases of wreaths for Sub Branch and District members.
- (3) Reasonable costs of meals and venue hire for significant Sub Branch or District birthdays, e.g.: 10, 20, 25, 30, 40, 50 years, etc.
- (4) Reasonable meal costs for volunteers and residents of aged care facilities after a significant commemorative event.
- (5) Reasonable costs of transport and meals for cadets participating in significant ceremonial events as formations, members of catafalque parties etc.
- (6) Traffic control costs for commemorative ceremonies.
- (7) Reasonable costs of recording equipment to preserve memories of commemorative events.
- (8) Visits to schools or aged care facilities to conduct or participate in commemorative services.
- (9) Facilitate the Community Link program in schools.
- (10) Encourage interest in military and ANZAC history among school students.
- (11) Provide book prizes for appropriately themed competitions in schools.
- (12) Costs towards memorials at local state schools to encourage participation in commemorative events.
- (13) Reasonable costs of participating in, and equipment required to participate, if representing and participating in a significant veteran related sporting event.

c. Assets

- (1) Reasonable costs for the purchase and installation of access ramps to Sub Branch premises.
- (2) Establishing and maintaining memorials, memorial gardens, and burial grounds for veterans.
- (3) Providing memorial gardens and flagpoles to schools and aged care facilities for veteran commemoration.
- (4) Maintaining veteran and defence museums and memorabilia (only after an application for funding from the DVA Saluting Their Service program has been rejected).
- (5) Financial assistance for the purchase of vehicles that are used solely for veteran welfare after other avenues of funding have been exhausted.

d. Others

- (1) Establishment of a food bank and /or blankets for those in need in the community.
- (2) The purchase of first aid kits. Note: replenishment of the kit will require a separate COF application.
- (3) The purchase of automated external defibrillators (AED). Note: the repair and maintenance of the AED will require a separate COF application.
- (4) In conjunction with schools, breakfast programs for students in need.
- (5) Reasonable costs associated with establishing a web or social media presence (up to \$2,000, including GST) for a District or Sub Branch.

4 Activities not meeting the guidelines.

a. Veteran welfare and support

- (1) Requests for funding or cost reimbursement where assistance and funding are available from other sources e.g. DVA, government agencies, grants, and community support avenues.
- (2) Cash payments to individuals or groups.
- (3) Retrospective applications.
- (4) Donations to other organisations unless it is to support a specific veteran welfare activity.
- (5) Payment of RSL membership fees.

b. Commemorative events

- (1) Flags, banners, marquees, wreaths for dignitaries, and other items for commemorative events.
- (2) Entertainment not of a commemorative nature.
- (3) Trips to overseas commemorative sites.
- (4) Costs of reunions for military associations.
- (5) Digitally commissioned pieces e.g. video, graphic design for commemorative events.

c. Assets

- (1) Costs associating with procuring, maintaining, or repairing the assets of Sub Branches, Districts, or other organisations.
- (2) All assets (apart from ramps and approved vehicles) including shipping containers, display cabinets, air conditioners and refrigerators.

d. Others

- (1) Costs associated with conducting the ongoing activities of the Sub Branch e.g.
 - Administration, office costs and general outgoings e.g. phone, rent, rates, electricity.
 - Wages.
 - Training courses unrelated to welfare type activities e.g. museum training, first aid training courses (other than for Sub Branch operational requirements) not specifically related to welfare.
- (2) Costs of speakers, musicians, and decorations at entertainment events.
- (3) Fundraising related expenses including speakers, musicians, decorations, meals, and prizes.
- (4) Commitment to recurring expenditure.
- (5) Social occasions and events which are not welfare or commemoration related e.g.
 - Sub Branch or District meetings or dinners.
 - Marketing or promotional activities.
- (6) Sporting participation and equipment unless representing a significant veteran event.
- (7) Costs to attend a reunion or other commemorative activity that is not the best use of the Fund, considering the greater good e.g. attending an overseas reunion.

The above lists are not exhaustive, and if more information or interpretation is required, please contact the District office in the first instance.

B. PROCESSES

1 Application process

(Refer to Attachment 1: Sub Branch application – Decision tree)

Charitable Objects Fund (COF) applications may be made for direct welfare or to support other Objects of the League which may affect the documentation required. Applications must include all documentation specified to avoid delays or rejection.

Sub Branch commences the process by filling in the Form A: COF Application form attaching:

a. Veterans' welfare related claim

- Form C: COF Hardship checklist form to be retained at Sub Branch office.
- Invoices or quotes from the vendor as applicable.
- Letter (or email) of rejection (LOR) as applicable from ex-service organisations or other external funding avenues (ESO) that were not able to assist the applicant.

b. Commemorative or other related claim

- Sub Branch's most recent bank statement to ensure welfare funds are used appropriately.
- Invoices or quotes from the vendor as applicable.
- Letter (or email) of rejection (LOR) from ex-service organisations (ESO) or other external funding avenues as applicable that were not able to assist the applicant.

c. GST (Goods and Services Tax) component

- (1) Sub Branches **registered** for GST – do not include GST in the application form, because GST is claimable from ATO through BAS lodgements.
- (2) Sub Branches **NOT registered** for GST – include GST in the application form.

d. Seek assistance

If you need assistance in filling out the form, please contact your District office.

e. Submit application and obtain nominee’s signatures.

Sub Branches must double check all documentation and applications before submitting to the District office. Once this has been done, the Sub Branch President or Deputy President and one other board member or Sub Branch Secretary MUST sign the form before submitting it to the District office.

f. Review application

The District office will review the COF application for completeness, and:

- If required, obtain additional information,
- Prints out the COF application form, and,
- Submit the application to the District Committee with all relevant documentation.

g. Assess application

The District Board will review the application and assess whether it should be approved and then record and sign the decision in the meeting minutes.

The decision from a District Board or a review by the Sub Branch Board must include:

- the minutes supporting approval of the Board, and
- supporting evidence such as quotes from the applicant.

If there is uncertainty around a particular request for assistance from the Fund, the District Secretary and President may contact RSL Queensland League Support Services for advice.

h. Release funds

If the application is successful, the District Treasurer releases the funds for use for the purposes outlined in the application only.

2 Acquittal process

(Refer to Attachment 2: COF- Acquittal process diagram)

a. Send Acquittals and Supporting Documents

To ensure continuity of funding and budgetary monitoring, District must acquit money provided from the Fund quarterly including:

- (1) Summary worksheet (please ensure GST column is filled).
- (2) Extract from the Minutes of the District meetings (signatures required) where funding was approved.
- (3) Form A: COF Application form.
- (4) Form C: COF Hardship checklist form (if required by District office only).
- (5) If payment was made to Sub Branch: Form B: Sub Branch acquittal report is required within 30 days after the funds is paid to the Sub Branch.

Any underspend by the Sub Branch must be returned to the District. RSL Queensland will reimburse the District for the actual amount spent by Sub Branches based on their proof of payment.

- (6) If payment was made directly to Suppliers:
 - Invoices showing \$0 balance, or
 - Payment receipts showing vendor's banking details, or
 - Bank statements showing transactions and vendor's banking details.

Please note: Statutory Declarations are not acceptable to complete the acquittal.

b. Analyse and review acquittals and supporting documents.

League Support Services – Group Commercial Accountant (GCAcc)

- (1) Analyses and reviews the District acquittal information for accuracy and completeness, including proof of expenditure of funds and verifies that the amount was allocated to the correct supplier's bank account.
- (2) Ensures acquittals conform to the funding guidelines and contribute to the Objects of the League.
- (3) Requests further information if required.

- (4) Provides the collated District acquittal information to the Head of League Support Services (HLSS) for review.
- (5) If the GCAcc considers that components of the acquittal do not meet the requirements of this guideline, the acquittal will be returned to the District for rectification.

c. Notify District Office

GCAcc will discuss the result with District office bearers.

If the acquittal meets the requirements, GCAcc will forward a payment request form to the Finance team.

If the District does not agree with LSS, the acquittal documents will be forwarded for consideration by the State Council of District Presidents.

C. REVIEW

This document shall be reviewed yearly by 31 December by the COF Review Committee comprising:

- Head of League Support Services (Chair)
- Finance Representative,
- Legal representative,
- Group Commercial Accountant.

The document owner is the GM League Support. The State Council of District Presidents shall be consulted for endorsement of these procedures and guidelines.

D. AVAILABLE GRANTS

The section below provides a brief explanation of external grants that may be available to Sub Branches in addition to the Charitable Objects Fund. For more information about these, please visit the Sub Branch Knowledge and Information Portal (SKIP).

ANZAC Day Trust

Opens May each year and is applied for retrospectively. The grant is extensive and covers a range of thresholds for application, including welfare, wages, bursaries, functions, and other activities and equipment.

Saluting their Service

A grant that is usually open year-round for ESOs and Veteran Community Groups.

Major Grant: Grants between \$10,001 and \$150,000 are available for major commemorative projects and activities that are significant from a national, state, territory and/or regional perspective.

Community Grants (Federal)

Grants to a maximum of \$10,000 are available for local, community-based projects and activities focused on service and sacrifice. Examples are honour rolls and boards, display cabinets, flagpoles.

Queensland remembers (may be discontinued in 2023)

Minor Grant: Funding from \$1000 up to a maximum of \$50,000 per grant, to deliver minor capital works projects, or for the purchase of equipment.

Major Grant: Funding from \$50,000 up to a maximum of \$250,000 per grant, to deliver major capital works projects.

Community Grant: Funding from \$1000 up to a maximum of \$50,000 per grant to assist communities to deliver commemorative activities and events, or to create or refurbish war memorials, avenues of honour and memorial gardens.

Building Excellence in support and training (BEST)

Grant assistance is available for 2 categories of expenses incurred by military compensation advocates undertaking compensation and welfare work:

- salary assistance, and
- equipment and administrative expenses assistance.

Salary assistance

BEST salary assistance is provided as a contribution to the salary of full-time and part-time military compensation advocates who help with claims for compensation or benefits.

Equipment and administrative expense assistance

BEST administrative expense grants are provided to assist with the purchase, and ongoing expense, of capital equipment, office consumables and domestic travel, including to attend compulsory ATDP training or assessment, where it is not possible for advocates to attend training or assessment online, by video, or in the local region.

Eligible equipment items

BEST funding is available as a contribution to expenses that can be shown to be directly related to the support required by compensation and/or welfare advocates in providing advice to the veteran and defence communities.

- Examples of expenses that would be eligible for BEST funding include:
- answering machines, bookcases, brochure holders, chairs, tables
- filing cabinets, compactus
- computer hardware, scanners, tablets, appropriate computer software
- white boards, printing, and printer supplies.

Gambling Community Benefit Fund (GCBF)

There are 4 rounds per year. The 1st round up to \$100K with subsequent rounds up to \$35K. Organisations can apply for a wide variety of items under the Gambling Community Benefit Fund (GCBF), for example:

- community events/training
- equipment (including medical equipment)
- facility improvements
- machinery
- printing/publications/marketing
- solar
- vehicles/boats
- workshops/conferences.

Foundation for Rural and Regional Renewal (FRRR)

The Strengthening Rural Communities (SRC) Small & Vital stream gives small remote, rural, and regional communities the opportunity to access funds that directly and clearly benefit local communities.

Grants up to \$10,000 are available for a broad range of grassroots, community-led initiatives that directly and clearly benefit local communities that strengthen local people, places, and climate solutions, with a preference for smaller communities (populations under 15,000).

Stronger Communities Grant

For up to 100% of project value for small capital works or capital expenditure project (up to a value of \$10,000) that delivers social benefits to your community. The minimum grant amount is \$2,500 with a maximum of \$20,000. The maximum value of the total project cannot exceed \$50,000.

There are many eligible activities including: alterations and extensions; computer hardware and software; websites; sporting equipment, musical instruments, vehicles, and trailers; office furniture.

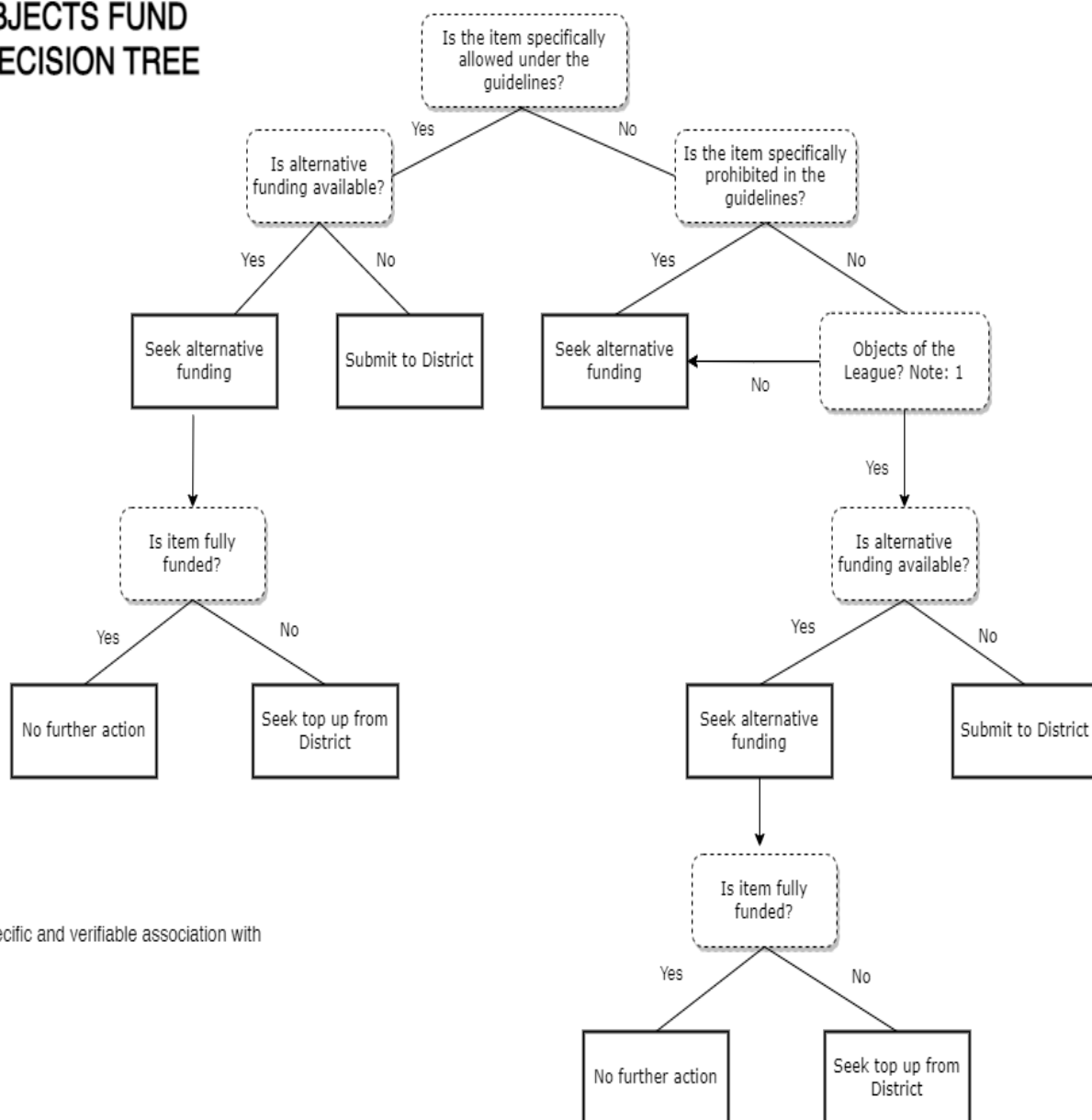
Other opportunities

There are a number of other funding opportunities that open from time to time, including local Council grants, mining companies, community stakeholder grants etc. The majority are small grants, usually up to \$5k (some only \$2K) and are generally for smaller equipment/appliances.

For any funding requirements, Sub Branches and Districts are encouraged to contact RSL Queensland League Support Services.

Attachment 1: Sub Branch application – Decision tree

**CHARITABLE OBJECTS FUND
APPLICATION DECISION TREE**



Note: 1 - does it have a specific and verifiable association with the Objects of the League?

Attachment 2: COF – Acquittal process diagram

**CHARITABLE OBJECT FUNDING (COF)
ACQUITTAL PROCESS**

