



Casella50for50 - Grant Application Terms

Casella Foundation Pty Ltd (ACN 129 891 210)

CONTENTS

1	Introduction & Purpose.....	2
2	Definitions.....	2
3	No Contractual Relationship.....	3
4	Entry Criteria.....	3
5	Criteria for Assessing Applications.....	5
6	Applications.....	5
7	Assessment.....	5
8	Offer for Funding.....	6

1 Introduction & Purpose

1.1 Introduction

- (1) To mark its 50th anniversary, Casella Family Brands is launching 'Casella50for50', a program designed to provide funding to benefit the wine regions the company's wineries call home.
- (2) Through the Casella50for50 campaign Casella Family Brands will pledge \$50,000 in 2019 to the Casella Foundation.
- (3) The Casella Foundation will administer the pledges \$50,000 by funding projects that will have a lasting community benefit in the wine regions of Riverina, Barossa, Limestone Coast, Rutherglen and Glenrowan.
- (4) \$10,000 will be allocated to each of the Wine Regions.
- (5) Not-for-profit organisations, foundations and project owners are invited to apply for all, or a proportion, of the \$10,000 allocated to their Wine Region.

1.2 Purpose

- (1) The following terms and conditions have been prepared by the Casella Foundation Pty Ltd (ACN 129 891 210) acting in its capacity as trustee to The Casella Fund (**Casella Foundation**)
- (2) These terms and conditions set out the requirements and criteria for entry and acceptance in the Grant Scheme.
- (3) The terms are subject to change from time to time.
- (4) Applicants must agree to these Application Terms prior to submitting an Application.

2 Definitions

- (1) In this policy:

Applicant means the Principal Representative of a Charity applying for the Grant Scheme.

Application means the grant application submitted by the Applicant for the Approved Funds in accordance with this document.

Approval Date means the date the Grantee is notified by the Casella Foundation of the success of the Application.

Approved Funds means the funds granted to the Grantee by the Casella Foundation to be used by the Grantee for the Approved Project.

Approved Project means a project undertaken by the Grantee exclusively in at least one Wine Region approved for funding by the Casella Foundation.

Casella Family Brands means Casella Wines Pty Ltd t/as Casella Family Brands.

Casella Foundation means Casella Foundation Pty Ltd (ACN 129 891 210) acting in its capacity as trustee to The Casella Fund.

Casella50for50 Committee means the committee selected by the Casella Foundation to select Applicants for the Grant Scheme.

Charitable Purpose is as defined in section 12 of the *Charities Act (Cth)* 2013.

Charity means a non-for profit:

- (a) individual;
- (b) body corporate;
- (c) body politic;

- (d) unincorporated association or body of persons; or
- (e) trust,

which has a Charitable Purpose.

Grant Conditions means document titled grant conditions setting out conditions for a Grantee receiving Approved Funds.

Grant Scheme means the Casella50for50 Grant Scheme described in section 1.1.

Grantee means a Charity situated within at least one of the Wine Regions and undertaking an Approved Project exclusively for the benefit of at least one Wine Region.

Payment Schedule means the payment schedule set out in Schedule 1 of these Terms.

Principal Representatives means individuals holding the position of CEO, Company Secretary, Treasurer or equivalent in a Charity.

Proposed Project means a project proposed by an Applicant to receive Approved Funds from the Casella Foundation.

Terms means this document setting out Grant Conditions.

Wine Region means any one or more of the following wine regions situated in Australia eligible for the Approved Funds granted by the Casella Foundation:

- (i) Riverina;
- (ii) Barossa,
- (iii) Limestone Coast;
- (iv) Rutherglen; or
- (v) Glenrowan

Wine Australia means the Australian Grape and Wine Authority t/as Wine Australia.

3 No Contractual Relationship

3.1 No Contractual Relationship

Submitting an Application for the Grant Scheme does not create a contract between the Applicant and Casella Family Brands or the Casella Foundation or otherwise impose any obligations upon Casella Family Brands or the Casella Foundation towards the Applicant.

4 Entry Criteria

4.1 Grant Scheme Information

- (1) The Grant Scheme is open to residents of Australia aged 18 years and over who are Principal Representatives of a Charity.
- (2) Opening and closing dates for applications are:
 - (a) 1 July 2019: Applications open; and
 - (b) 31 July 2019: Applications close at 5pm AEST.
- (3) Late applications for the Grant Scheme will not be accepted.
- (4) Successful Applicants will be notified via the contact number or email address provided with the application.

- (5) By entering this Grant Scheme, the Applicant is indicating his/her agreement to be bound by these terms and conditions.
- (6) Only one entry will be accepted per person. Multiple entries from the same person will be disqualified.

4.2 Applicant Eligibility Criteria

- (1) The Applicant must be a Charity as defined in the Terms & Conditions operating in the specified Wine Regions of
 - (a) [Riverina](#);
 - (b) [Barossa](#);
 - (c) [Limestone Coast](#);
 - (d) [Rutherglen](#); and
 - (e) [Glenrowan](#).
 as defined in Wine Australia's Geographical Indications.

4.3 Project Criteria

- (1) For an Applicant to qualify for the Grant Scheme:
 - (a) The Applicant's Proposed Project must have a Charitable Purpose.
 - (b) The Applicant's Proposed Project must provide substantial benefits to a community in one of the specified Wine Regions.
 - (c) The Applicant's Proposed Project must advance the aims of the Applicant's Charity.
 - (d) The Applicant's Proposed Project must not be targeted at benefiting an individual;
 - (e) Both the Applicant and the Proposed Project must be located in Australia with Approved Funds being spent in Australia; and
 - (f) Works undertaken on the Proposed Project must commence before the 30 June 2020.
- (2) For the avoidance of doubt applications for funding an Applicant operating outside these Wine Regions will not be considered.
- (3) The following Applications will not be considered by Casella Family Brands;
 - (a) Submissions by an auspice organisation;
 - (b) Maintenance of an established project or program;
 - (c) Retrospective funding for any existing project;
 - (d) Funding of any deficit or equity of an organisation;
 - (e) General fundraising appeals;
 - (f) Programs considered to be government responsibility at a Federal, State or Local Government level;
 - (g) Promotion of any religion;
 - (h) Promotion of any political organisation(s);
 - (i) Funding of any school buildings or premises, unless the project is used for wider community benefit;
 - (j) Funding of any private conferences and seminars; or

- (k) Current administration costs.

5 Criteria for Assessing Applications

The following criteria in this section 5 will be used to determine which Applications will be offered funding by the Casella Foundation.

5.1 Applicant Capability

- (1) Whether the key personnel involved in the Charity have the relevant and necessary expertise, experience and ability to undertake the Proposed Project.
- (2) Whether the Applicant's Charity has the capability to complete the Proposed Project within a twelve (12) month timeline.

5.2 Benefits of the Proposed Project

- (1) The Casella Foundation will assess what benefits the Proposed Project offers to the local community within the specified Wine Region and whether these benefits will assist the local community in the long term.
- (2) Applicants with Proposed Projects that have the greatest potential to achieve their stated benefits will be favoured.

5.3 Scientific quality and feasibility of Proposed Project

- (1) If the Proposed Project is a research project, the following will be assessed;
 - (a) Whether the Applicant has undertaken sufficient research and provided evidence to satisfy the proposed project's rationale;
 - (b) Feasibility of timeline for the Proposed Project; and
 - (c) Whether the applicant has obtained all relevant and necessary planning permissions and/or council approvals.

5.4 Budget

- (1) Whether the applicant has carefully considered, documented and provided an appropriate budget for the proposed project including an outline of fund allocation.

6 Applications

- (1) All Applications must be:
 - (a) completed through the Online Application Form, available through Casella50for50 grant portal; and
 - (b) complete with any necessary supporting documentation attached.
- (2) Applications must be submitted through the Casella Family Brands online grant portal. Applications will not be considered if submitted via other channels.
- (3) Applications should be answered correctly and honestly.

7 Assessment

7.1 Casella50for50 Committee

- (1) The Casella50for50 Committee will assess Applications on the criteria outlined in section 5 of this document.

- (2) The Casella50for50 Committee aims to communicate the outcome of Applications to Applicants by 2 September 2019 by:
 - (a) Notifying successful Applicants with a preliminary offer for funding; and
 - (b) Notifying unsuccessful Applicants.
- (3) Application outcomes are final and appeals will not be considered by the Casella50for50 Committee.
- (4) The Casella50for50 Committee will not provide feedback to Applicants.

8 Offer for Funding

- (1) The Casella Foundation's preliminary offer for funding will set out the total grant amount proposed to be provided to the Applicant by the Casella Foundation.
- (2) The Casella Foundation's preliminary offer of funding is determined at their absolute discretion and may not match the Applicant's requested funding in their Application.
- (3) The Casella Foundation may amend their preliminary offer for funding at any point at their absolute discretion.
- (4) After receiving the preliminary offer of funding, Applicant's will liaise with the Casella Foundation to determine further details regarding their Proposed Project. If the Casella Foundation is satisfied with the details of the Proposed Project the Casella Foundation will provide the Applicant with Grant Conditions.
- (5) The Applicant can accept the offer of funding by signing the Grant Conditions and any other documentation or agreements as required by the Casella Foundation.
- (6) The Approved Funds will not be released until section 8(4) is complied with to the satisfaction of the Casella Foundation at their absolute discretion.