



Applying for a Grant - OBrien Real Estate Foundation

If your community purpose is in alignment with our Purpose and Values, and your organisation holds Deductible Gift Recipient Status, we will welcome a grant application for consideration by the OBrien Real Estate Foundation Committee & Board of Directors.

The OBrien Real Estate Foundation will give preference to organisations and projects that:

- Create opportunities for OBrien staff to participate as volunteers
- Are already supported by OBrien staff
- Are initiated by OBrien staff in association with community organisations in which they are already actively involved
- Projects and organisations that are in close proximity to an OBrien Real Estate Office

Your grant application should include details on how OBrien staff can help your organisation.

The OBrien Real Estate Foundation aims to fund specific projects (preferred amount of up to \$5,000) in the following areas:

- Education
- Community Sporting Activities
- Community Support Groups
- Medical Research and Support Groups
- Innovative projects from local community organisations

This application form can be filled in, saved and emailed to

foundation@obrienrealestate.com.au

OR completed and posted to:

OBrien Real Estate Foundation C/- OBrien Real Estate (Head Office)

Address: 1341 Dandenong Road, Suite 2, Level 2, UL40, Chadstone VIC 3148

Closing dates for applications: 30th June, 30th September, 31st December, and 31st March each year Closing times are 5pm on the date stated. Trustee meetings are usually held within four (4) weeks of the closing date.

What we can't consider:

The OBrien Real Estate Foundation cannot consider requests from:

- Individual applicants
- Political organisations
- Religious or sectarian organisations involved in purely religious/sectarian activities (with the exception of projects which benefit the wider community)
- Foundations that are themselves grant making bodies



TELL US ABOUT YOUR ORGANISATION

Applications must provide the following information, including required attachments, in order to be considered:

Name of your organisation:

ABN number:

Postal address:

Street address:

Telephone number:

Facsimile number:

Tax Status: You must provide certification from the Australian Tax Office [ATO] that shows that the ATO has endorsed your organisation's tax status as a Deductible Gift Recipient with effect from 1st July 2000 or later – either by its inclusion in legislation, its inclusion in a publicly accessible register, or by notification. We are unable to consider your grant without the provision of this information – please supply us with a copy of your DGR certification.

Authorised contact person's details:

Name & title:

Telephone number:

Email address:

If an OBrien staff member or Office supports your submission please include the full name and contact details of the staff member and their office details.

Affiliated OBrien Real Estate Office (if any):

Affiliated OBrien Real Estate Staff Member (if any):

Phone number of OBrien Real Estate staff member:

References:

Provide the names and contact details (including telephone numbers) of two individuals (can include OBrien staff) or organisations that would speak in support of the application if requested to do so. Alternatively, enclose letters of support from them. If an OBrien staff member supports your submission please remember to include this person as your affiliate.

Reference 1)

Reference 2)



Funding Requirement:

Our preferred funding commitment is currently capped at \$5000.00 per grant, however all applications will be considered on their merits.

Grant Amount your organisation is seeking:

How will these funds make a difference to your Organisation?

Explain your funding need & how it will make a difference. Information that you can provide in support of your grant application will assist the Trustees to make a final decision.

If possible, provide an itemized budget (income and expenditure) for your project or activity. This is important in the event that your application can only be partly funded.

Tell us how OBrien Real Estate staff can be involved (if possible) in your organisation or project?

Additional information required:

Please provide a brief history and the purpose of your organisation:

Who benefits from the activities of your organisation?

Tell us about your current programs or the services that you offer:

How many paid full-time, part-time and casual staff, does the organisation employ?

How many unpaid volunteers regularly assist?

Provide the most recent financial statement, audited if available. This statement should reflect actual expenditures and funds received in the most recently completed financial year.

Provide a brief summary of all grants (if any) that your organisation has received in the last two years from trusts and foundations.

Provide a summary of any Federal, State or Local Government funding that you have received, either as one off, or ongoing funding (if any).



Applicant's declaration: I, (insert full name)

Confirm that I am authorised by the organisation to make this application on its behalf and say that all the information provided is true and correct. I have read the terms and conditions relating to the application for a grant from the OBrien Real Estate Foundation, including the privacy statement and consent to use of personal information on the following pages, and agree to those terms and conditions.

Signature:

Date:

Have attached the following items?

- 🍏 DGR status confirmation
- 🍏 Written references if any
- 🍏 A budget for your proposed activity or project
- 🍏 Most recent financial statements (if possible)
- 🍏 Any other relevant information



OBrien Real Estate
Foundation

Privacy Statement and Consents

Privacy Act 1988

The OBrien Real Estate (and its related entities) are committed to protecting the privacy of your personal information.

OBrien Real Estate is required to comply with the Privacy Act 1988 (Cth) including the Australian Privacy Principles (APPs).

This policy is intended to provide a general overview of our policies for the handling of your personal information. Other policies may apply instead of or in addition to this Privacy Policy in certain circumstances.

By using our websites (including our website obrienrealestate.com.au, and any other website we may establish or operate from time to time), and/or providing your personal information to us you consent to us handling your personal information in accordance with this Privacy Policy.

Collection of your personal information

The kinds of personal information we collect and hold about you, and our use of that information, is dependent on the products and services we provide to you.

In addition to operating a national real estate franchise network, the products and services that we (and/or our franchisees and licensees) provide include providing real estate agency services for the buying, selling, leasing, development and advertising of residential, commercial and rural properties, business broking and providing services in connection with arranging utility connection, removalists, cleaners, conveyancing, financing and insurance.

Generally, this personal information may include (but is not limited to) your name, address, date of birth, telephone number, email address, details of the products or services you have enquired about, property value, rental amounts, insurance details, references (in relation to rental arrangements and job applicants) and photo identification.

Generally, we collect your personal information directly from you unless it is impracticable or unreasonable to do. From time to time, we may collect personal information about you from third parties (for example, from your representative, from publicly available sources, from your referees where you apply for a position with us).

If you provide us with personal information about a third party, you represent, and we collect it on the basis that you have that person's consent for us to collect and handle their personal information in accordance with this privacy policy.

When collecting your personal information, we will take reasonable steps to provide you with certain information as required under the APPs, including the purpose of collection, who we may disclose your personal information to, any law that requires or authorises us to collect the information and the main consequences if we do not collect all of the personal information we require. If we collect your personal information from another source, we will take reasonable steps to ensure you are aware of the fact and the circumstances of that collection.

Generally, if we are unable to collect the personal information we require we may not be able to provide you with the products and services you seek. If the information provided is incorrect or incomplete, this may also prevent, limit or otherwise affect our ability to provide products or services to you.

Purposes for which personal information is collected, held, used and disclosed

We will use and disclose your personal information for the purposes for which we collected it, and for other related purposes that you would reasonably expect.

Generally, these purposes include responding to your enquiries, providing you with products and services such as those set out in section 2 above, providing you with marketing information about our products and services and those of our agents, obtaining your feedback on your customer experience, conducting promotional activities and for our general business operations (for example, recruitment, maintenance of our business records, compliance with our legal and insurance obligations and statistical purposes).

By providing us with your personal information, you consent to us using your personal information for these purposes. You agree that we may send you such information by post or by electronic means such as email. You can opt-out of marketing and promotional communications at any time by contacting our Privacy Officer via the details shown below.

We may exchange your personal information within the OBrien Real Estate corporate entity. We may also disclose your personal information to our franchisees, licensees, agents and contractors for the purposes set out above,



and for the purposes of those parties providing services to us or performing business services or functions on our behalf.

Apart from the above instances, we may also use and disclose your personal information with your consent and as otherwise required or permitted by law.

Sensitive Information

We will only collect 'sensitive information' with your consent. We will assume that you have consented to us collecting all information which is provided to us by you for use in accordance with this policy, including any 'sensitive information', unless you tell us otherwise at the time you provide it to us.

Storage and security of your personal information

We may hold your personal information in electronic formats or in hard copy.

We take reasonable steps to securely store your personal information to ensure it is protected from unauthorised access, modification and disclosure, and from other types of misuse, interference and loss. This includes electronic and physical security measures and procedures, staff training and use of password protection software.

We will take reasonable steps to destroy or permanently de-identify your personal information when we no longer require it for any purpose for which it was collected. We may retain your personal information for as long as necessary to comply with any applicable law, for legal, insurance and corporate governance purposes, for the prevention of fraud and to resolve disputes. Your personal information may also be retained in our IT system back-up records.

The transfer of data over the Internet is inherently insecure. We cannot guarantee the security, during transmission, of any personal information provided to us via our websites. Please bear this in mind when transmitting information by this means to us.

Access and correction of your personal information

You may lodge a request to correct personal information that we hold about you if you believe it is inaccurate, incomplete, out-of-date, irrelevant or misleading by contacting our Privacy Officer via the contact details shown below.

You may request that we provide you with access to the personal information we hold about you. Generally, we will provide you with access, except in limited circumstances where the APPs permit us to deny access. Any such requests must be made in writing and directed to our Privacy Officer via the details shown below. Under the APPs we are permitted to charge you a reasonable fee for providing access to your personal information. Please note that no fee will be incurred for requesting access, and if your request for access is accepted we will inform you of the fee (if any) that will be payable for providing access if you proceed with your request.

You may ask us to inform you of the source of any personal information about you that we have collected from a third party. We will provide this at no cost, except in limited circumstances where the APPs or other laws permit us to withhold this information.

O'Brien Real Estate website

Our websites use cookies. We do not use the information stored in those cookies to collect information about you or your computer. The cookies are used for statistical purposes and to assist with your use of the website. We may also collect click-stream data when you use the website, such as the date and time of your visit, the pages you accessed, your IP address, the type of browser and operating system you are using and the websites you come from and move to. This information is collected for statistical purposes to assist us to find out how our website is used and navigated and to improve our website.

O'Brien Real Estate websites may contain links to third party websites. O'Brien Real Estate is not responsible for the privacy, security or handling of your personal information via those websites. You should review the privacy policy and terms of use for those websites each time you visit them.

Overseas disclosure of your personal information

The O'Brien Real Estate will not transfer personal information to a recipient in a foreign country:

- (a) without the prior consent of any individual whose personal information is contained in that data;
- (b) unless the country in question has similar privacy legislation and protections as Australia.

Changes to our Privacy Policy



OBrien Real Estate
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We may amend, modify or replace this Privacy Policy at any time. You should review our Privacy Policy each time you visit our website or provide us with personal information.

Who do I contact for further information?

OBrien Real Estate's Privacy Officer can assist you with any enquiries you have about the information that we hold about you. They can be contacted on (03) 87680434 from 9.00am to 5.00pm (Melbourne time), Monday to Friday.

You can also write to the Privacy Officer at:

OBrien Real Estate Corporate

Suite 3, 10 Adams Lane

Berwick 3806

Fax (03) 8768 0400

e-mail corporate@obrienrealestate.com.au

What if I have a complaint or concern?

If you have a complaint or concern you can phone the OBrien Real Estate's Privacy Officer on (03) 87680434 or write to the Privacy Officer at the address above. We will do our best to try and resolve your complaint within 90 days.

What if you are unable to resolve my complaint or concern?

If we are unable to resolve your complaint within this time, or you are unhappy with the outcome, you may refer your complaint to the Australian Information Commissioner. The Australian Information Commissioner can be contacted at the below details:

The Office of the Australian Information Commissioner

GPO Box 5218

Sydney NSW 1042

Phone: 1300 363 992

Fax: (02) 9284 9666

e-mail: enquiries@oaic.gov.au

TTY: 133 677 then ask for 1300 363 992

How does this policy change over time?

OBrien Real Estate may change this Privacy Policy from time to time. Any updated versions of this Privacy Policy will be posted on our website and will be effective from the date of posting.

This privacy policy was last updated on 5 February 2016.

Although OBrien Real Estate intends to observe this policy at all times, it is not legally binding on OBrien Real Estate in any way. From time to time OBrien Real Estate may regard it as necessary or desirable to act outside the policy. OBrien Real Estate may do so, subject only to any other applicable contractual rights you have and any statutory rights you have under the Act or other applicable legislation.