



Grant Application Guidelines - OBrien Real Estate Foundation

Thank you for considering applying for a grant from the OBrien Real Estate Foundation. Below are the guidelines and requirements for submitting your application:

Eligibility Criteria:

Your organisation must align with our Purpose and Values.

Your organization must hold Deductible Gift Recipient Status.

Preference will be given to projects that involve OBrien staff, are supported by OBrien staff, or are initiated by OBrien staff in collaboration with community organizations.

Projects located near an OBrien Real Estate Office will be prioritised.

Grant Focus Areas:

Education

Community Sporting Activities

Community Support Groups

Medical Research and Support Groups

Innovative projects from local community organizations

Application Process:

Complete the application form and email it to foundation@obrienrealestate.com.au or mail it to:

OBrien Real Estate Foundation C/- OBrien Real Estate (Head Office) 329-331 Ferrars St South Melbourne Victoria 3205.

Application Deadlines:

Applications are accepted until the 30th of June, 30th of September, 31st of December, and 31st of March each year, closing at 5 pm. Trustee meetings typically occur within four weeks after the deadline.



What We Can't Consider:

- Requests from individual applicants.
- Applications from political organizations.
- Projects solely related to religious or sectarian activities, except those benefiting the wider community.
- Applications from grant-making bodies.

Tell us about your Organisation:

Applicants must provide the following information along with the required attachments in order to be considered:

- Organisation Name
- ABN Number
- Postal Address
- Street Address
- Telephone Number
- Email Address
- Tax Status (Certification from the Australian Tax Office is mandatory)
- Authorised Contact Person's Details (Name, Title, Telephone Number, Email Address)
- Affiliated OBrien Real Estate Office and Staff Member (if applicable)
- References (Names and contact details of two individuals who can vouch for your organisation)
- Funding Requirements
- Grant Amount Requested
- Explanation of how the funds will benefit your organisation
- Itemised budget (income and expenditure) if possible
- Opportunities for OBrien Real Estate staff involvement

Additional Information Required:

- Brief history and purpose of your organisation
- Beneficiaries of your organization's activities
- Details of current programs or services offered
- Number of paid staff and volunteers
- Most recent financial statement (audited if available)
- Summary of grants received in the last two years
- Summary of government funding received



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 the 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



Privacy Statement and Consent

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 notional 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, whom 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 facts 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 the 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 access request 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.

OBrien 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 in finding out how our website is used and navigated and to improve our website.

OBrien Real Estate websites may contain links to third-party websites. OBrien 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 OBrien 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

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?

Please review our privacy policy at <https://www.obrienrealestate.com.au/privacy-policy/> for further information. You can also write to the Privacy Officer at:

OBrien Real Estate Corporate

329-331 Ferrars St South Melbourne Vic 3205
phone: 03 9100 0779
email: corporote@obrienrealestate.com.au

What if I have a complaint or concern?

If you have a complaint or concern you can submit it through our website at <https://www.obrienrealestate.com.au/feedback-form/> 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

email: 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 in July 2023.

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.

We appreciate your interest in the OBrien Real Estate Foundation and look forward to reviewing your application. If you have any questions, please don't hesitate to contact us.