

Purpose

To address systemic issues reducing quality of life for older Victorians.

Funding amount

3-year grants of up to \$250,000 per year

Timeframes

EOI Phase

- Opens 29th September 2025
- Closes 24th October 2025

Final Grant Round

- Opens 1st December 2025
- Closes 30th January 2026

Outcomes

- By 6th April 2026

***Eligibility**

- Item 1 DGR organisations which are registered as a charity with the Australian Charities and Not-for-profits Commission and endorsed with charity tax concessions.

***Please refer to the Appendices for examples of the required documentation**

Ageing Well

FY2025/26 – FY2027/28 Grant Round Guidelines

Expression of Interest (EOI) Stage

State Trustees has developed the Ageing Well grant program to address systemic issues reducing quality of life for older Victorians. By 2031 it is projected that 57% of Victoria's population will be over 65 (State Government of Victoria 2019).

The focus of the program is to address the areas of healthy ageing, financial and elder abuse, and social isolation.

We are seeking to support initiatives that deploy collective impact approaches – engaging individuals, families, communities, and making effective use of existing programs.

Note: To minimise the burden on applicants, this grant round will be conducted as a two-stage process. Stage one will call for Expressions of Interest. Shortlisted applicants will then be invited to submit a full application in the Final Grant Round.

Assessment Criteria

All applications will be assessed and ranked against each other. State Trustees are seeking submissions that:

- Address systemic issues relating to 'positive ageing' for older Victorians
- Are informed by lived experience
- Are ²innovative and take a systems view
- Have a focus on prevention
- Deploy integrative and collective impact approaches
- Promote cross-sector collaboration
- Provide an evidence base to demonstrate the effectiveness of programs
- Support advocacy / education
- Advance / improve policy and practice
- Are Victorian based

We are especially interested to support organisations that will widely promote across the community the importance of 'positive ageing'.

¹The Australian Psychological Society (APS) defines Positive Ageing as: "the process of maintaining a positive attitude, feeling good about yourself, keeping fit and healthy, and engaging fully in life as you age".

²Innovation can be interpreted as 'novel solutions to a social problem that is more effective, efficient, sustainable, or just than existing solutions' (Phills, Deiglmeier & Miller 2008).

Who is eligible to apply?

An eligible entity is endorsed as item 1 Deductible Gift Recipient (DGR) and registered as a charity with the Australian Charities and Not-for-profits Commission (ACNC), with charity tax concessions.

(Note: please refer to the Appendices for examples of the required documentation)

What are the funding exclusions?

- Organisations can only apply for one project per round
- Organisations that have not acquitted previous projects for any of State Trustees' granting programs
- Applications identical to a previously submitted, unsuccessful application
- General fundraising appeals
- Organisations that receive direct income from entities whose principal purpose is to promote gambling, alcohol, tobacco or armaments
- Organisations whose funded activity may seek to proselytise a particular faith or religion to its beneficiaries
- Universities and other institutions seeking funding for academic research projects or research positions with minimal or no research translation activity or no community-based partners

- Applications from Universities or Medical Research Institutes must come from the relevant Philanthropy / Fundraising office
- Retrospective funding
- It is not State Trustees' preferred practice to fund existing positions or supplement existing staff budgets – please speak to us prior to applying if you propose to do this
- 'For-profit' bodies and commercial activities
- State and Commonwealth Government bodies
- Political parties or their candidates
- Work conducted outside Victoria
- Individuals
- Personal living expenses
- Loans

What are the timeframes?

EOI Round Opens	Monday 29th September 2025, 9am
EOI Round Closes	Friday 24th October 2025, 5pm
Final Round Opens	Monday 1st December 2025, 9am
Final Round Closes	Friday 30th January 2026, 5pm
Outcome notifications	By Monday 6 th April 2026
Conditions of Awards	To be returned by the recipient within 5 business days of successful outcome notification

How much funding is available for a project?

The round provides three-year grants of up to \$250,000 per year.

What is the assessment process?

- Applicant organisations will be first reviewed to confirm if they are eligible entities.
- Applications will be assessed against the program application criteria, with applications which are most aligned with our preferences and objectives receiving a higher rating.
- Assessment is made using a blended assessment model, where ranking and qualitative analysis is used to inform decisions. Ratings are made on a 6-point scale:
 - 0 = application completely fails to address criterion
 - 1 = application largely fails to meet the criterion
 - 2 = application just fails to meet the criterion
 - 3 = application meets criterion
 - 4 = application meets criterion well
 - 5 = application meets criterion at a high level
- Notifications of outcomes will be sent via email.

- Due to resourcing, feedback regarding decision-making is unable to be provided for every application.

How are payments made?

Payments will be made by electronic funds transfer only to the nominated bank account provided in the application within 5 business days of a returned Conditions of Award.

What reporting will be expected if your application is successful?

6-month phone update <i>Informal</i>	A member of our grant team will call to discuss the start of the project
Grantees Meet and Greet and/or other stakeholder engagement	During 2026 – To be confirmed
Acquittal reports	Annually with final due 1 month after project completion (as defined in application)

Remember that you can call or email at any time if you have any questions about the progress of your project.

How do I apply?

We use SmartyGrants – an online application form. Remember to save each page when entering information. We recommend reading these tips on how to use SmartyGrants: [Help Guide for Applicants](#).

Application Checklist

Have you:

- ☐ Read the objectives and exclusions?
- ☐ Noted the important dates?
- ☐ Prepared eligibility details, including ABN, Australian bank account?
- ☐ Prepared copies of proof of eligibility including Item 1 Deductible Gift Recipient, Charity Tax Concession endorsements, and ACNC registration?
- ☐ Prepared links to your annual report or financial statements?

Already familiar with SmartyGrants? Then log in to our application form:

https://statetrustees.smartygrants.com.au/AW_EOI_FY26-28

Who do I contact for more information?

Contact us on **(03) 9667 2845** or send us an email if you would like more information or to discuss your project: charitable@statetrustees.com.au

Note: Please do not add us to your direct marketing / appeals lists. This may result in all your correspondence being treated as 'spam' in our email processes.

Examples of projects we've funded

Take a look at what we funded in the last [Ageing Well Program](#).

Appendix 1: Item 1 DGR Endorsement



Australian Government
Australian Taxation Office

17 June 2005

Endorsement as a deductible gift recipient

Endorsement as a deductible gift recipient under Subdivision 30-BA of the *Income Tax Assessment Act 1997* is provided as detailed below.

Name	THE TRUSTEE FOR AUSTRALIA FOUNDATION
Australian business number	21 430 812 751
Endorsement date of effect	1 July 2000
Provision for gift deductibility	[REDACTED]
Item(s) in Subdivision 30-B of the <i>Income Tax Assessment Act 1997</i>	[REDACTED]

Your organisation's endorsement as a deductible gift recipient, together with the date or period of effect, is entered in the public register maintained by the Australian Business Registrar at www.abr.business.gov.au

Your organisation must notify the Tax Office in writing if it ceases to be entitled to endorsement.

Michael Carmody
Commissioner of Taxation and
Registrar of the Australian Business Register

CHARITY_ADVICES_397-GDG-0000034-0000068

Appendix 2: Charity Tax Concessions Endorsement



Australian Government
Australian Taxation Office

8 July 2005

Notice of endorsement for charity tax concessions

This endorsement notice has been issued to:

Name	THE TRUSTEE FOR AUSTRALIA FOUNDATION
Australian business number	21 430 812 751

THE TRUSTEE FOR AUSTRALIA FOUNDATION, a charitable fund, is endorsed to access the following tax concessions from the dates shown:

- **Income tax exemption** from **1 July 2000** under Subdivision 50-B of the *Income Tax Assessment Act 1997*.
- **GST concessions** from **1 July 2005** under Division 176 of *A New Tax System (Goods and Services Tax) Act 1999*.

Your organisation's endorsement to access charity tax concessions, together with the date or period of effect, is entered in the public register maintained by the Australian Business Registrar at www.abr.business.gov.au

Your organisation must notify the Tax Office in writing if it ceases to be entitled to endorsement.

Michael Carmody
Commissioner of Taxation and
Registrar of the Australian Business Register

CHARITY_ADVICES_411-TED-0020382-0004192

Appendix 3: ACNC Charity Registration Certificate



Australian
Charities and
Not-for-profits
Commission



THIS CERTIFIES THAT

CHARITY ORG NAME

ABN: **ABN NO.**

IS A REGISTERED CHARITY
AND HAS BEEN TRANSFERRED FROM THE

Australian Taxation Office

TO THE

Australian Charities and Not-for-profits Commission

ON THE DATE OF

DD / MM / YYYY

CERTIFIED BY

A handwritten signature in black ink that reads "Susan Pascoe".

Susan Pascoe AM

Commissioner

Australian Charities and Not-for-profits Commission

Copy only. Original available on request

