



The Alexander Forbes Community Trust Funding Criteria

The Alexander Forbes Community Trust provides funding to community projects which fall within the focus areas listed below based on merit as well as compliance with the requirements as stipulated in this document:

- | | |
|--------------|---|
| 1. Aged | Renovations of old age homes |
| 2. Disabled | Projects aimed at contributing towards the social rehabilitation of people with disabilities |
| 3. HIV/AIDS | Day care centres benefiting children affected by and/or infected with HIV/AIDS |
| 4. Women | Income generating initiatives benefiting women |
| 5. Education | Financial support to students studying towards the following qualifications: <ol style="list-style-type: none"> 1. B.Sc Actuarial Science 2. B.Comm Risk & Insurance 3. B.Business Administration at the CIDA Campus |

The project must:

- Cover at least one of the focus areas as listed above.
- Benefit previously disadvantaged communities. At least 80% of the project beneficiaries must be Black (Africans, Coloureds and Asians) as defined in the Department of Trade and Industry Codes of Good Practice on Broad-Based Black Economic Empowerment.
- Be a registered South African NPO/NGO/CBO and provide a Section 18 Tax Certificate.
- Have audited financial statements and effective management systems.
- Be able to demonstrate project sustainability and capacity to benefit more people.

IT3616/03

Alexander Forbes Community Trust funding criteria ©

Trustees of Alexander Forbes Community Trust: L Pule (chairperson) D Malabie T Ncube D Nicol M Mphatsoe F Shweni



Submission:

All project applicants are required to submit a written proposal for funding which, amongst other things, must include the following:

- Background about the project
- Project objectives & beneficiaries
- Project services/activities
- Any income-generating initiatives
- Project management
 - Organogram /project structure
 - Financial management, corporate governance & accountability
- Funding requested - detailed line item budget .

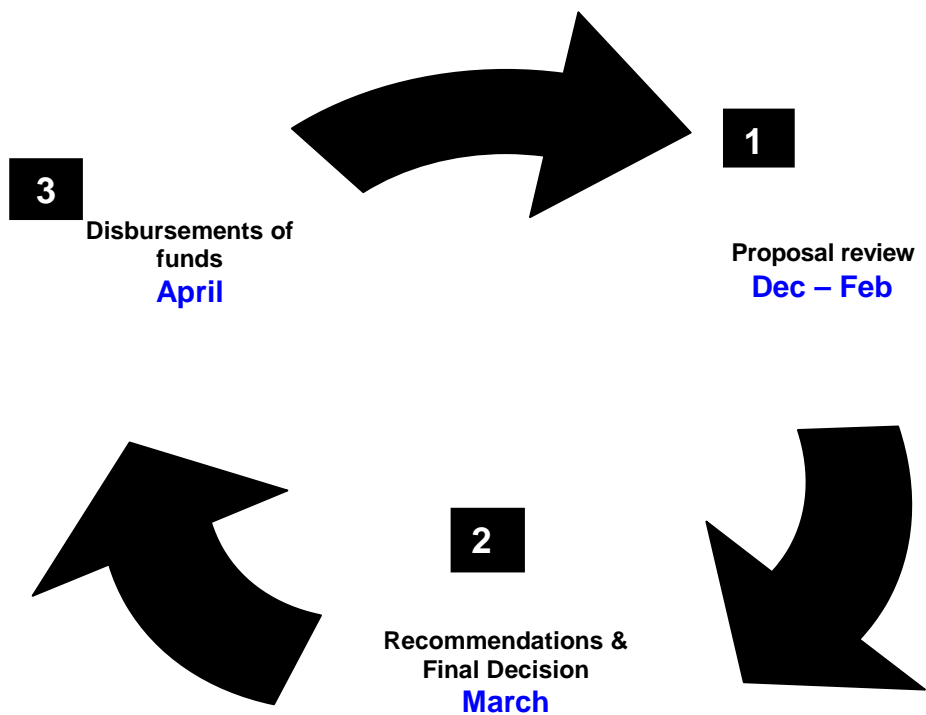
The Alexander Forbes Community Trust does not fund the following:

- Advertising
- Fines/Penalties
- Fund-raising activities & Entertainment
- Investments
- Awareness campaigns, training programmes and research
- Vehicles & immovable assets
- Lobbying/consultants fees
- Political parties
- Any funding for individuals
- Sports activities
- Sponsorship initiatives such as events, promotional material and overseas trips.



The Funding Cycle

New proposals and existing projects will be reviewed at the beginning of each funding cycle in line with the company's financial year (01 April - 31 March). The review process will take place between December and February. Recommendations will be forwarded to the trustees of the Alexander Forbes Community Trust for final decision. Disbursements of committed allocations should be made by the beginning of April each year.





2011 / 2012 Funding

The Alexander Forbes Community Trust has already committed its entire budget for the 2009/ 2010 and 2010/2011 financial years. All requests for new funding will only be reviewed during **January 2011** for the **2011/2012** financial year.

All enquiries may be forwarded to:

Don Ray Malabie

E-mail address: malabied@forbes.co.za

Disclaimer:

If your community project, in respect of which you require funding, falls within the funding criteria and you have submitted your proposal for consideration, the Alexander Forbes Community Trust shall not, under any circumstances, be obliged to award funding to your project. The awarding of funding is at the discretion of the trustees of the Alexander Forbes Community Trust. Furthermore, the Alexander Forbes Community Trust and the trustees shall not be liable for any damages which you may suffer or any costs or expenses, of any nature whatsoever, which may be incurred by you as a result of, in connection with or incidental to the submission of the proposal or the trustees' decision.