

WATSON-BROWNE BEQUEST
Policy and Procedure for Application
February 2007

1. INTRODUCTION

In February 1998, the WA AIDS Council received a Bequest from the estates of two men, Mr Russell Watson and Mr Donald Browne. By the time the Council received the funds, the relevance of the specific nature of the Bequest terms was limited. The Council sought an order for the terms of the trust to be altered so that the funds could be spent appropriately.

In October 2003, after a Supreme Court Order was made, the Watson/Browne Bequest of \$180 000 became available to the WA AIDS Council for application for the following purposes;

- A. The provision of services to homosexual persons in WA who are suffering from AIDS or HIV as follows:
 - (i) Nursing services, domestic services, massage and other therapies for the care and comfort of any such person in palliative care
 - (ii) Counselling services
 - (iii) Publication and distribution of pamphlets and information kits containing information on subjects that promote the health or alleviate the suffering and discomfort of AIDS and HIV sufferers including information about nutrition and complementary therapies.

- B. The provision of financial and other assistance to homosexual persons in WA of limited means who are suffering from AIDS or HIV as follows:
 - (i) Financial assistance to purchase medicinal or pharmaceutical items required for treatment of AIDS or HIV and associated conditions;
 - (ii) Provision of equipment or items to alleviate the suffering and discomfort of persons suffering from AIDS and HIV;
 - (iii) Financial assistance to purchase equipment or items of the type referred to in (ii);
 - (iv) Emergency welfare assistance including financial assistance to pay utility accounts, purchase food and purchase small household items;
 - (v) Financial assistance to pay fees and expenses for retraining to assist in obtaining suitable work.

(Supreme Court - Cy-pres Scheme 3 9 03)

It should be noted there is no time frame for this expenditure.

Even though the Supreme Court order provides guidance about how the bequest should be spent, it does not provide sufficient detail about specific programs or projects or the process by which choices are made.

3. THE PRINCIPLES RELATED TO THE USE OF THE BEQUEST:

- The use of the Bequest will enhance the health and wellbeing of HIV+ gay men;
- The use of the Bequest will meet a charitable purpose namely the advancement of health, education, and/or the alleviation of poverty;
- The Bequest will fund projects and programs that provide the greatest good for the greatest number of people rather than individuals - with the exception of some items (see below);
- The Bequest is to be managed by the WA AIDS Council for use by HIV+ gay men who receive Positive Services, and projects and programs for HIV+ gay men within WAAC, or under the auspices of the Council. The Bequest will NOT be available to other organisations or third parties, however it does not preclude funding projects or programs run in partnership with the Council;
- The Bequest will generally fund projects and programs for which there is no other funding available and/or there is a paucity of access to services;
- The Bequest will be placed in a fund which receives interest;
- The amount of money from the Bequest used in any one financial year will be limited to an amount up to \$30 000 until the fund runs out; and
- The outgoings and balance of the Bequest fund will be reported annually.

4. CRITERIA FOR THE USE OF THE BEQUEST

4.1 Individuals

Individuals may apply for assistance of up to \$2000 per financial year to a maximum of \$5000 over a three year period for personal needs such as dental work, re-training or education, provision of equipment or items to alleviate discomfort and/or nursing services, complementary therapies or domiciliary services. This amount may be increased in the case of a person in receipt of palliative care.

4.2 Projects or programs (see following examples for suggestions):

- Retreats (including men from rural and remote areas and Aboriginal HIV+ men);
- Educational forums/ conferences where external speakers or facilitators are funded;
- Scholarships for HIV+ gay men to attend interstate conferences;
- Updating the library and resources for HIV+ gay men as necessary;
- Subscriptions for appropriate newsletters; and
- Funding videoconferencing for people living in rural and remote regions and facilitated groups.

4.3 Funding for HAPAN

- A sum of \$5000 per annum will be reserved for the peak body representing the positive community in WA as recognised by WAAC and NAPWA (currently HAPAN) for expenditure consistent with the charitable purpose/ principles as deemed by the group.

- Receipts and invoices will be submitted to the Business Manager for Audit purposes.
- HAPAN is not precluded from applying for further grants, however the above sum must be exhausted first.

5. PROCESS OF APPLICATION FOR FUNDS:

The following process applies to programs and projects aimed at providing services to groups and individuals. For individuals requiring palliative care, the decision for using Bequest funds will be made by the Manager of Positive Services in conjunction with the Business Manager.

- Details are to be provided on the application form (attached); except for individuals requiring palliative care;
- These applications will be assessed (by face to face meeting or electronically) by a small group (eg Board Member (other than the Chairperson), the Business Manager and a representative from HAPAN or an appropriate member of the positive community) on a regular basis. The HIV+ member(s) of the panel would not be able to assess any application for which they would receive a benefit;
- The Applicant needs to demonstrate support for the project (In the case of an individual application, a quote or invoice should be supplied);
- Decisions will be relayed to the applicant in a timely manner;
- Funding will only be paid on the production of evidence that an expense has been incurred eg invoice/quote;
- A request for funds to assist with pharmaceutical expenses must demonstrate significant financial hardship; and
- Any grievances with the process or decision is to be addressed to the Chairperson of the WA AIDS Council.

**WATSON/BROWNE BEQUEST
APPLICATION FORM**

Date: _____

Name: _____ DoB _____

Address: _____

Phone number: _____ email _____

Have you ever made an application previously? (Please circle) Yes No

If yes, please state when and for what purpose:

How much are you requesting in this application? : _____

Please state what the funding will be used for:

Please describe how the funding will enhance the health and well-being of HIV+ gay men:

Please state if alternative funds have been sought and, if so, what?

Please show evidence that support for the project has been sought and by whom:
