



LOERIESFONTEIN SED SUSTAINABILITY FUND

FUNDING GUIDELINE

(Socio-Economic Development – Tiers 2 & 3)

The SED Sustainability Fund supports **non-profit organisations and socially driven entities** that have successfully completed Tier 1 (Community Fund) projects and demonstrated measurable impact in the community. It is designed to strengthen, expand, and sustain programmes that build social cohesion, skills, education, culture, health, and other socio-economic development priorities in Loeriesfontein.

1. Who can apply?

Established community organisations and socially driven entities in Loeriesfontein, including:

- Non-Profit Organisations (NPOs)
- Non-Profit Companies (NPCs)
- Community-Based Organisations (CBOs)
- Forums, Clubs, and Cultural Groups
- Social Enterprises with a strong SED focus
- Cooperatives focused on community benefit
- Collaborations for special events or large-scale socio-economic initiatives
- Schools and publicly funded institutions.
- NGO's aligned with the religious fraternity (but not linked to only 1 denomination or church).

2. Requirements

Applicants must meet the following conditions:

- The organisation must be **based in Loeriesfontein** and support socio-economic development in the community.
- It must be in operation for at least **12 months**.
- **Tier 2 applicants** must have successfully completed **Tier 1 (Community Fund)** and its full Monitoring & Evaluation (M&E) process.
- **Tier 3 applicants** must have successfully completed **Tier 2 funding** and its full 12-month M&E process.
- The organisation must be managed by directors, office bearers, or a **committee** who maintain proper records.
- It must be registered (or awaiting registration) with the **Department of Social Development (NPO Directorate)**, **CIPC** (for NPCs or Co-operatives), or another relevant authority.
- It must have a **bank account** with a recognised banking institution and maintain full records of all financial transactions.
- It must hold a valid **Tax Clearance Certificate or PIN**, or be willing to apply for one.
- Organisations that have received little or no external funding must have an **annual budget under R500,000**; established organisations must provide audited or independently reviewed financial statements if available.
- It must **disclose all other sources of funding** (if applicable).
- It must demonstrate mobilisation of **local assets** (physical, financial, social, natural, and human resources).
- It must be willing to **collaborate** with other stakeholders in the community.
- It must be willing to participate in **capacity development, monitoring, evaluation, and learning** linked to the grant.
- It must be willing to make **reporting and accountability public**.
- It must submit a **valid BBBEE certificate**.
- It must provide **three quotes** for each requested item.

- Only companies / directors / members that are in good standing with respect to the use of previous funding will be considered.

Permission to deviate from approved budget must be given in writing to the Project Companies and/or Grant Administrator. This request must be submitted **BEFORE** the expected expenses are incurred. **Any expenditure that is not in line with the contracted obligations or approved deviation request, will lead to the black-listing of the respective company/organisation and possible legal action.**

3. Funding Tiers and Disbursement

- Tier 2: R50,001 – R150,000 (second-time applicants)
- Tier 3: R150,001 – R250,000 (third-time or higher applicants)

Disbursement:

- Funds will not be released as a lump sum.
- Tier 2: maximum of 12 tranches.
- Tier 3: maximum of 12 tranches.
- All equipment purchases will be made by the project company.
- Subsequent tranches will only be released upon:
 - Submission of proof of expenditure (bank statements, receipts, photos).
 - Site verification where required.
 - Attendance at monthly M&E sessions.

4. Desirable Projects/Organisations That Qualify

Projects must strengthen **social and community development**, be **asset-based**, and deliver measurable community benefits. Eligible projects include those that:

- Strengthen education, training, and skills development.
- Support arts, culture, heritage, and sport.
- Improve community health and wellness.
- Promote youth empowerment and leadership.

- Address social challenges such as poverty, unemployment, and exclusion.
- Build sustainable community programmes with lasting impact.

Preferred initiatives include:

- Large-scale cultural or sporting events.
- Skills training centres and education programmes.
- Youth and women empowerment initiatives.
- Community wellness and social services projects.
- Programmes that create measurable social impact across multiple community groups.

Preferred initiatives include those that strengthen social cohesion, build community capacity, and create lasting social impact.

Examples: *Community health and wellness programmes, cultural and heritage initiatives, youth empowerment and leadership projects, skills development and training centres, education and literacy initiatives, sport and recreation activities, women empowerment programmes, and large-scale community events such as festivals, awareness campaigns, or markets that bring people together.*

5. Non-Permissible Categories of Spend

Funding will not be granted for:

- Projects that are not community oriented.
- Operations that are political in nature.
- Activities with a negative social, economic, or environmental impact.
- Emergency measures to cover shortages, repay loans, or act as guarantees for loans.
- Bursaries, or sponsorships.
- Projects that cover only operating costs.
- Overseas study or individual studies.
- Payment of overdue bills (e.g., Eskom, Telkom).

- Religious activities (unless clearly part of a community initiative).
- Purchase or lease of land, buildings, or containers – unless accompanied by a proven, sustainable and detailed business plan.
- Vehicles or repairs to vehicles (any means of transport requiring a license will not be funded) – unless it forms a part of your core business.
- Directors and/or shareholders should not exceed 65 years of age.

Note: *Stipends/grants for proven new or additional jobs created may be considered in the short term, subject to the discretion of the ED Manager.*

6. Training Requirements

Completion of **mandatory/compulsory** once-off 5-day training before disbursement:

Periodical refresher training courses will be conducted on a case-by-case basis.

- Tier 2 (Intermediate): Budgeting, forecasting, cashflow management, tax compliance, risk management.
- Tier 3 (Advanced): Financial systems for scaling, tender costing, procurement, governance, and internal controls.
- A Project/Organisation director or full-time operational manager must attend.

7. Procedure

Applications can be submitted at any time by email or at the project company's office. They will be reviewed according to the monthly schedule. Applicants must:

- Complete the application form accurately and fully. Attach all required supporting documents as listed in the checklist.
- Provide detailed project/organization information, including description of activities, products, and/or services.
- Explain how the project/organization benefits the community and supports local economic development.
- Describe the history of the project/organization, including key milestones and achievements.

- Submit budget projections with specific costs requested, supported by three quotes.
- Prepare for potential site visits to verify information provided.
- Ensure project/organization premises and records are available for inspection.
- Submission: Email the completed form and documents to applications@jlkbusinessconsulting.co.za or submit to the project company's office.

Review Process:

- Applications reviewed monthly.
- Awards committee evaluates based on criteria.
- Applicants may be contacted for clarification or additional info.
- Successful applicants will be notified in writing.

Note: *Funding for equipment will be procured directly by the Project Project/Organization and supplied to the applicant.*

8. Type of Awards

Funding can be provided in the form of:

- **Sustainability Grant:** A funding amount paid in instalments (tranches) for approved activities.
- **Matching Grant:** The project company will contribute R2 for every R1 that the applicant/group raises (2:1 ratio).
- **Direct Purchase:** The project company will directly purchase approved goods/equipment and/or services or provide other material support.
- **Annual Innovation Grant:** A cash award for innovative projects and organizations that harness new ideas and technologies.
- **Technical Grant:** Funding for training, mentorship, exposure visits, and other capacity-building activities.

Note: *Applicants to the Sustainability Fund only qualify for Tier 2 (R50,001–R150,000) and Tier 3 (R150,001–R250,000). Re-applicants must show demonstrable impact of previous funding. Projects must be completed within 12 months. Tier 3 applications will only be considered if the applicant has previously qualified for Tier 2 funding and successfully completed the full 12-month Monitoring & Evaluation (M&E) process.*

Funding is subject to available budgets.

9. Liability

Successful applicants will:

- Receive written notice and sign a contract.
- Receive a reporting template.
- Receive funding disbursed in tranches tied to milestones and submission of progress/financial reports.
- Submit monthly progress and financial reports with supporting receipts and documentation.
- Be subject to site visits and verification.
- Participate in capacity building, networking, and other opportunities.
- Provide information for marketing and publication purposes.
- Make reports and accountability public.
- Ensure profitability and sustainability of the business within one year.
- Understand that previous non-compliance will result in automatic disqualification.
- Need to have a proven track-record of using grant funding in line with the application and approval.

Please contact the project company officer for more information or assistance with your application. Send your application to applications@jlkbusinessconsulting.co.za

Incomplete applications will not be considered.

Application Deadline:

The 7th of each month

LOERIESFONTEIN SED - COMMUNITY FUND APPLICATION FORM

(Enterprise Development)

Please read this application form carefully and ensure that all required information is provided. If you need help, please take the liberty of calling the Project/Organization's project officer.

SECTION 1. GENERAL INFORMATION

1.1. Name of Project/Organization for which funding is requested:

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Type of Business: (Please check)

Organisation Type	Tick (✓)	If Other, please specify
Non-Profit Organisation (NPO)	<input type="checkbox"/>	
Non-Profit Company (NPC)	<input type="checkbox"/>	
Community-Based Organisation (CBO)	<input type="checkbox"/>	
Forum / Club / Cultural Group	<input type="checkbox"/>	
Cooperative	<input type="checkbox"/>	
Social Enterprise	<input type="checkbox"/>	
Other	<input type="checkbox"/>	_____

CIPC Registration Number (if applicable): _____

Tier of Application: ☐ Tier 2 (R50 001 – R150 000) ☐ Tier 3 (R150 001 – R250 000)

Is this your 2nd, 3rd, or 4th application? _____

1.2. Contact Details:

Address:

..... Postal code:

Telephone:

Email:

Name and cell no.: Contact person 1:

Name and cell no.: Contact Person 2:

1.3. Project/Organization Owners/Directors:

Full Name & Surname	ID Number	Position	Contact Details	Gender (M/F)	Age	Date Joined

1.4. People who work for the Project/Organization:

Full Name & Surname	Title / Position	Gender (M/F)	Age	Time Contributed per Week (hours)	Training / Skills

Name of Director:

Signature: Date:

1.5. Bank details

Name of the bank:

Address of bank:

Account Type:

Account No:

Branch code:

Who will check or audit the books?

Name and surname:

Contact Number:

SECTION 2. DESCRIPTION OF THE PROJECT/ORGANIZATION

2.1. Background *(Who started the business, when and why it was founded?)*

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2.2. Intention *(What is the main goal or objective of the business?)*

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2.3. Highlights *(What has gone right since the business was started? What are you proud of?)*

2.4. Description *(What goods or services do you offer – what do you do?)*

2.5. Detailed operational plan *(for the next 6 months) – take more pages if necessary*

What are you going to do (tasks)?	Who will be responsible?	When will it be finished?
1.		
2.		
3.		
4.		
5.		

2.6. Partners/networks *(Who are your suppliers/partners? Who do you connect with or collaborate with? What do they do that benefits your Project/Organization?)*

2.7. Marketing strategy *(How will you market the Project/Organization?)*

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2.8. Local economic development *(How will the enterprise stimulate and benefit the local economy)?*

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2.9. Assets / Resources

(Which local assets or resources are being contributed to the project?)

Type of Contribution	Description of Contribution	Number of Hours (if applicable)	Value / Cost (R)	Source (from whom?)
Labour and time				
Cash / Capital				
Special skills				
Premises / Property				
Equipment				

Type of Contribution	Description of Contribution	Number of Hours (if applicable)	Value / Cost (R)	Source (from whom?)
Other support				

2.10. Budgets requested – be specific

<i>Item – What do you need the money for?</i>	<i>Cost</i>
Grand total	

(Please attach 3 quotes for any goods and services)

2.11. Demonstrable impact of previous funding (For re-applicants only)

Please describe the impact of previous funding and how it has contributed to the goals of the Project/Organization. Provide details on milestones achieved and results.

SECTION 3. TERMS AND CONDITIONS

I, (name and surname), authorized by the Project/Organization director(s), declare that the information provided above is correct and confirm that the Project/Organization accepts the terms and conditions of any award received.

Signature: Date:

Witnesses (two required):

- *Name: Signature:*
- *Name: Signature:*
- *Date:*

SECTION 4. TRAINING COMMITMENT DECLARATION

I, (name and surname),
authorised representative of (Project/Organization name),
hereby commit to attending and completing the **mandatory 5-day Financial Management and Compliance training** as part of the funding requirements of the Sustainability Fund.

Signature of Director/Owner: Date:

Witness Name: Signature:

SECTION 5. CHECKLIST

- ☐ Registration document (NPO certificate, NPC incorporation, or relevant constitution/founding document)
- ☐ Latest **six-month** bank statements of the organisation
- ☐ Valid Tax Clearance and BBBEE certificate
- ☐ Three quotes for each requested item
- ☐ Detailed project proposal or organisational profile showing growth/expansion plan
- ☐ Audited or independently reviewed financial statements (if available)
- ☐ Stamped bank confirmation letter
- ☐ Certified copies of IDs of the applicant and all directors/committee members
- ☐ Proof of organisational address (not older than three months)
- ☐ Purchase plan or project implementation plan with clear milestones
- ☐ Proof of completed Financial Management training (5-day compulsory course)
- ☐ Evidence of impact from previous funding (photos, reports, receipts, testimonials, beneficiary lists, bank statements)

Important:

- Applications missing any required documents will not be processed.

Applicants for **Tier 3** must also submit **proof of successful completion of Tier 2 funding and the 12-month M&E process.**

For internal use only:

<i>Received by:</i>	<i>Date:</i>
<i>Approved/Rejected: Date:</i>	
<i>Amount:</i>	
<i>Signature:</i>	