

## **Community Trust Development Programme**

### **1 Welfare and humanitarian**

- 1.1 The care or counselling of, or the provision of education programmes relating to, abandoned, abused, neglected, orphaned or homeless children.
- 1.2 The care or counselling of poor and needy persons where more than 90% (ninety per cent) of those persons to whom the care of counselling are provided are over the age of 60 (sixty).
- 1.3 The care or counselling of, or the provision of education programmes relating to, physically or mentally abused and traumatised persons.
- 1.4 The rehabilitation, care or counselling of persons addicted to a dependence-forming substance or the provision of preventative and education programmes regarding addition to dependence-forming substances.
- 1.5 The promotion of protection of family stability.
- 1.6 Community development for poor and needy persons and anti-poverty initiatives, including:
  - 1.6.1 the promotion of community-based projects relating to self-help, empowerment, capacity building, skills development or anti-poverty;
  - 1.6.2 the provision of training, support or assistance to community-based projects contemplated in paragraph 1.6.1 of this Annexe "1";
  - 1.6.3 the provision of training, support or assistance to emerging micro enterprises to improve capacity to start and manage businesses, which may include the granting of loans on such conditions as may be required by the Founder;
  - 1.6.4 the provision of legal services for poor and needy persons; or
  - 1.6.5 the provision of facilities for the protection and care of children under school-going age of poor and needy parents.

### **2 Health care**

- 2.1 The provision of health care services to poor and needy persons.

- 2.2 The care or counselling of terminally ill persons or persons with a severe physical or mental disability, and the counselling of their families in this regard.
- 2.3 The prevention of HIV infection, the provision of preventative and education programmes relating to HIV/AIDS.
- 2.4 The care, counselling or treatment of persons afflicted with HIV/AIDS, including the care or counselling of their families and dependants in this regard.
- 2.5 The provision of primary health care education, sex education or family planning.

### **3 Land and housing**

- 3.1 The development, construction, upgrading, conversion or procurement of housing units for the benefit of poor and needy persons.
- 3.2 The development, servicing, upgrading or procurement of stands, or the provision of building materials, for purposes of the activities contemplated in paragraph 3.1 of this **Annexe "1"**.
- 3.3 The provision of residential care for retired persons, where more than 90 per cent of the persons to whom the residential care is provided are over the age of 60 and regular meals and nursing services are provided by the organisation carrying on such activity.
- 3.4 The provision of residential care for disabled persons where regular meals and nursing services are provided by the organisation carrying on such activity.
- 3.5 Building and equipping of community centres, clinics, sport facilities or crèches of other facilities of a similar nature for the benefit of the poor and needy.

### **4 Education and development**

- 4.1 The provision of education by a "school" defined in the South African Schools Act, No. 84 of 1996.
- 4.2 The provision of "higher education" by a "higher education institution" as defined in terms of the Higher Education Act, No. 101 of 1997.
- 4.3 "Adult basic education and training", as defined in the Adult Basic Education and Training Act, No. 52 of 2000, including literacy and numeracy education.

- 4.4 "Further education and training" provided by a "public further education and training institution" as defined in the Further Education and Training Act, No. 98 of 1998.
- 4.5 Training for unemployed persons with the purpose of enabling them to obtain employment.
- 4.6 The training or education of persons with a severe physical or mental disability.
- 4.7 The provision of bridging courses to enable educationally disadvantaged persons to enter a higher education institution as envisaged in paragraph 4.2 of this **Annexe "1"**.
- 4.8 The provision of educare or early childhood development services for pre-school children.
- 4.9 Training of persons employed in the national, provincial and local spheres of government, for purposes of capacity building in those spheres of government.
- 4.10 The provision of school buildings or equipment for public schools and educational institutions engaged in public benefit activities contemplated in paragraphs 4.1 to 4.8 of this **Annexe "1"**.
- 4.11 Career guidance and counselling services provided to persons for purposes of attending any school or higher education institution as envisaged in paragraphs 4.1 and 4.2 of this **Annexe "1"**.
- 4.12 Programmes addressing needs in education provision, learning, teaching, training curriculum support, governance, whole school development, safety and security at schools, pre-schools or educational institutions as envisaged in paragraphs 4.1 to 4.8 of this **Annexe "1"**.
- 4.13 Educational enrichment, academic support, supplementary tuition or outreach programmes for the poor and needy.
- 4.14 The provision of scholarships, bursaries and awards for study, research and teaching, however subject to the following conditions -
- 4.14.1 All scholarships, bursaries or awards granted by the Trust are *bona fide* and be granted to an individual on grounds of objective merit or need;
- 4.14.2 No scholarship, bursary or award granted by the Trust may -

- 4.14.2.1 be revocable, otherwise than for reasons of a material failure to conform to the designated purpose and conditions of that scholarship, bursary or award;
- 4.14.2.2 be subject to conditions which would enable the Trust of the funds of that scholarship, bursary or award or any connected person in relation to the Trust, to derive some direct benefit from the application of that scholarship, bursary or award; or
- 4.14.2.3 be granted to any person who is or will become an employee of the Trust of the funds of that's scholarship, bursary or award or organisation (or any associated institution in relation to the Trust or organisation) or any relative of that person, unless circumstances indicate that that scholarship, bursary or award would have been granted to that person or his or her relative, even if that person had not been an employee of the Trust or associated institution.
- 4.14.3 All decisions regarding the granting of scholarships, bursaries and awards must be made by a duly constituted committee consisting of at least three persons who are not connected persons in relation to the donors of the person to whom the scholarship, bursary or award is granted; and
- 4.14.4 All scholarships, bursaries and awards granted by the Trust in respect of overseas study, research or teaching will be subject to an undertaking by the person to whom the scholarship, bursary or award is granted –
- 4.14.4.1 to apply the knowledge obtained from the study, research or teaching immediately after completion thereof, in the Republic for a period of at least the period that the study, research or training was funded by the Trust; or
- 4.14.4.2 To refund the full amount of the scholarship, bursary or award should he or she decide not to apply the knowledge as contemplated in subparagraph 4.14.4.1

## **5 Conservation, environment and animal welfare**

- 5.1 Engaging in the conservation, rehabilitation or protection of the natural environment, including flora, fauna or the biosphere.

5.2 The care of animals, including the rehabilitation, or prevention of the ill-treatment of animals.

5.3 The promotion of, and education and training programmes relating to, environmental awareness, greening, clean-up or sustainable development projects.

## **6 Sport**

The administration, development, co-ordination or promotion of sport or recreation in which the participants take part on a non-professional basis as a pastime.

## **7 General**

The development of sustainable business enterprises for the benefit of the communities within the Associated Community.

## **8 Excluded Activities**

8.1 The following areas are generally not considered for support by the Trust:

8.1.1 individuals or small groups acting in their personal capacity, save to the extent that such proposed initiative meets the requirements for Projects under this Deed;

8.1.2 travel, either by groups or as individuals;

8.1.3 political parties or groups with partisan political affiliations;

8.1.4 labour unions, save to the extent that such proposed initiative meets the requirements for Projects under this Deed;

8.1.5 individual bursaries/bursary funds other than as contemplated under paragraph 4.14 of this Annexe "1";

8.1.6 conferences;

8.1.7 video and film productions;

8.1.8 cultural exhibitions or once-off cultural events, provided that this exclusion shall not preclude the Trust from making Allocations in respect of Projects related to or associated with such exhibitions or events where such Projects will foster sustainable development and job creation;

- 8.1.9 generalised fund raising circulars or events such as fund raising dinners or golf days;
- 8.1.10 company promotions and membership subscriptions;
- 8.1.11 religious organisations (other than community outreach) including the construction and maintenance of places of worship;
- 8.1.12 loans other than as contemplated under paragraph 1.6.3 of this **Annexe "1"**;
- 8.1.13 overseas tours and exchanges;
- 8.1.14 until the Final Date only, endowment trusts;
- 8.1.15 grand projects which are beyond the capacity of the Trust to contribute to meaningfully;
- 8.1.16 large infrastructural projects e.g. dams, roads and water being undertaken by Government; and
- 8.1.17 advertising in educational or other supplements.