

Calliope and District Enterprises Ltd

Community Funding Policy and Guidelines

Version 5.1

Revised February 2018

ABN 71 133 571 061
Shop 3, Calliope Central Shopping Centre, 2041 Dawson Highway, Calliope QLD 4680
Phone 07 4975 7844 Fax 07 4975 7188
Franchisee of Bendigo and Adelaide Bank Limited ABN 11 068 049 178 AFSL 237879

STAB (210176_v2) (28/03/2014)

Calliope & District Enterprises Limited

Calliope & District **Community Bank**[®] Branch

Community Bank[®] Funding Program

'Support the Bank that supports your community'

Introduction

The Calliope & District **Community Bank**[®] Branch is operated by a community owned company, Calliope & District Enterprises Ltd (CDE). The Bendigo Bank products and services held at our Calliope & District **Community Bank**[®] Branch generate our income. We dedicate a portion of the profits we make from these products and services to our **Community Bank**[®] Funding Program, and as our business grows with banking support, our funding program grows and we are in turn able to support more community groups.

The program seeks to make targeted use of funds that are responsive to community needs. We fund projects and activities that offer clear public benefit to our community, contributing to development in community welfare, environmental, health, education and arts or cultural areas.

CDE offers three types of funding:

- **Donations** – are the provision of goods or financial support with no expected benefits in return.
- **Grants** – are the provision of funds or material for a specific and/or strategic project, given on the basis of need rather than promotional and marketing opportunities.
- **Sponsorship** – is a marketing and communication tool that allows for the purchase of tangible potential rights and benefits associated with an event, entrant, or organisation, and results in increased brand awareness, communication of key messages and increased customer base, whereby sponsor, recipient and the target market all benefit. Sponsorship is to be distinct from advertising, which is communications-based aiming to positively influence individual and community perceptions about brand, with the desire to attract additional customers and therefore additional revenues for the Calliope & District **Community Bank**[®] Branch.

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Successful funding programs involve good communication and forward planning and have benefits for both recipients and the donor. The potential for community exposure and the opportunity for generating follow-on support in the form of banking business are of high importance when we assess a funding application. Details of what our Community Bank will gain as a result of the funding request should be specified within your application form and examples of this occurring should be returned with your Completion Report. The outcome of an application is determined by many measures which include the benefits to the community and the **Community Bank**[®] Branch. All Funding Applications to be submitted at least three months prior to an Event to allow sufficient time for processing and Board review.

Should you have questions or queries, or require any assistance or guidance with your application, please contact our (Branch Manager/Secretary/Committee).

Remember, banking business held at our Branch gives us the ability to contribute back to the community.

“Support the bank that supports your community”

The Directors

Calliope & District Enterprises Ltd.

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Calliope & District Community Bank® Branch

Thank you for your interest in our **Community Bank®** Funding Program. We ask that you read the 'Funding Guidelines' and complete the appropriate Application Form with as much detail as possible to allow us to assess your application thoroughly. Please submit any supporting documentation with the completed application.

Applications for donations, sponsorship & grants are now taken throughout the year and the committee will assess submissions on receipt and applicants will be notified of the outcome within 6 weeks.

Funding Guidelines

Eligibility

Before applying, please make sure that your organisation fits the essential eligibility criteria.

- Incorporated charitable/not-for-profit organisation, or an organisation registered by an Act of Parliament, with charitable/not-for profit objectives.
- Have an ABN or ATO tax exemption
- Be a client of the Calliope **Community Bank®** Branch for its banking needs unless it can be demonstrated that this bank cannot provide the specific services required.

If your group is not incorporated, you may wish to find another local, incorporated not-for-profit group to auspice your application. In this case the auspice agency must make the application on your behalf. An 'auspice agency' is an organisation that agrees to act as the trustee of your projects funds and assumes financial responsibilities related to successful completion of your project. But *your* group still manages the actual implementation of the project. This third party organisation will also need to meet the eligibility requirements.

Calliope & District Enterprises Limited

What can be funded?

Projects, events and initiatives in the following categories are eligible under the Calliope & District **Community Bank**[®] Branch Funding Program.

- Families, children and youth initiatives
- Public health programs and services
- Innovative community services
- Community capacity building projects
- Public education, school buildings and libraries
- Sporting, cultural and arts initiatives
- Environmental projects

Sponsorship funding for communities, events or initiatives must also meet the following criteria:

- Support the integrity and image of the Calliope & District **Community Bank**[®] Branch
- Be relevant to the wider community

What cannot be funded?

- Projects that cannot demonstrate community support and benefit
- Events associated with gambling or alcohol
- Events that create environmental hazards
- Events that mistreat or harm animals
- Events or programs that denigrate, exclude or offend minority groups
- Political or religious organisations in most cases
- Programs that may present a danger to public health or safety
- Programs that do not reflect community standards
- Events that take place outside of the Calliope and District area

Application process

1. Fill in the appropriate attached application form.

Electronic forms are available by emailing

admin@cde1.com.au or download from our website

www.bendigobank.com.au/public/community/our-branches/calliope

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Calliope & District Enterprises Limited

2. Post or email the application form to Calliope & District Enterprises Ltd.

Post

The Secretary
Calliope & District Enterprises Ltd
PO Box 360
Calliope QLD 4680

Email

admin@cde1.com.au

3. Deliver the completed application form to our local branch, situated at Shop 3, Calliope Central Shopping Centre.

Assessment Process

Applications for donations (up to a value of \$500) will be assessed by the Calliope & District **Community Bank**[®] Branch Manager.

All other applications will be assessed by CDE's Funding Committee.

For applications of up to \$5,500 (Including GST), the Funding Committee will contact applicants to advise them of the outcome. Applications \$5,500.00 and under must include a minimum of one quote (per item) to support of the total amount of application.

For applications of more than \$5,500 (Including GST), recommendations are presented to CDE's full Board of Directors. The application requires you to supply a minimum of two quotes (per item) in support of total amount of application. Following this, applicants will be contacted to advise them of the outcome of their application.

In all cases, decisions made by the Committee/Board will be final.

Distribution of funds

The funding of successful applications will follow shortly after the receipt of a tax invoice and any other requirements as outlined in the approval letter. Funds are transferred by direct credit to the organisations account.

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STAB5 (21/01/16_v2) (28/03/2014)

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Funding Conditions

All Fund recipients must sign a Funding Agreement with Calliope & District Enterprises Ltd. Applications of \$500 or less will receive a Letter of Offer and will not be required to complete the more formal Funding Agreement. The Funding Agreement will outline all the conditions, including but not limited to the following:

- **Funding payments** – funds must be paid into a Calliope & District **Community Bank**[®] Branch account.
- **Acknowledgement** – Calliope & District **Community Bank**[®] Branch must be acknowledged in all promotional and media communications related to the funded project/initiative/event.
- **Completion Report** – all funding recipients must submit a Completion Report to Calliope & District Enterprises Limited no later than 3 months after either completion of a project for Grants or after an Event for Sponsorship including:
 - A brief written report outlining the main outcomes and benefits of the project/event/initiative.
 - A Statutory Declaration or other documentary evidence confirming that all funds were expended as outlined in the application form and Funding Agreement, and
 - Photographs for publicity use by Calliope & District **Community Bank**[®] Branch.

Other Funding Conditions

- Calliope & District Enterprises Ltd also has arrangements with the Bendigo Bank Community Enterprise Foundation as a source of funding, currently for Grants but soon to incorporate Sponsorship. If deemed appropriate, the Funding Committee may submit any application to the Foundation for its consideration. Applicants will be required to comply with any Bendigo Foundation requirements if the application is so directed.
- Failure to supply a Completion Report as outlined above may affect any future application to CDE.
- The Funding Committee may request additional information for any application and request personal representation.
- In the case of applications from individuals, the applicant should provide evidence of pre-existing community benefit from his or her chosen activity and demonstrate how support from CDE will assist the continuance and enhancement of that activity.

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- Canvassing of Board members by any applicant is strictly prohibited and any breach may result in the rejection of an application.
- Proof of evidence of how money was spent may be requested.

Privacy Bendigo and Adelaide Bank Limited is committed to ensuring your privacy is protected and understands your concerns regarding the confidentiality and security of the personal information you provide. The information contained in this form will be held by Calliope & District **Community Bank**[®] Branch and may be disclosed to Bendigo Bank and organisations that carry out functions on behalf of Bendigo Bank. Our full privacy policy is available online at www.bendigobank.com.au. Bendigo and Adelaide Bank Limited. ABN 11 068 049 178 AFSL 237879.

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