

APPLICANT GUIDELINES

Community Investment Program

2020/21 Grants & Sponsorships



APPLICATIONS OPEN MONDAY 20 JULY 2020

APPLICATION CLOSE 5PM, MONDAY 31 AUGUST 2020

Community Bank Lancefield and Romsey branches of Bendigo Bank proudly support our community through sponsorships, grants and major community projects.

We encourage a diverse range of organisations to apply for the **Community Investment Program (CIP)**. This year, our Community Investment Program will be administered by Bendigo Bank's philanthropic partner, the **Community Enterprise Foundation**.

In this document, you will find guidelines to assist you in completing your organisation's application.

What is a Community Investment Program?

Our Community Investment Program (CIP) is the co-ordinated approach to managing funding requests and grants administration (including sponsorships).

In previous years, Community Bank Lancefield and Romsey have administered funding requests internally, but due to the growth in our local community and the number of funding requests, it has been decided to partner with the Community Enterprise Foundation to ensure an efficient and effective process for our CIP in 2020/21.

The **aim of this program** is to:

- provide community organisations seeking a grant or sponsorship with a clear process for doing so;
- assist the Community Bank Board to make informed decisions and allocate funds to maximise community impact;
- be strategic in intent and responsive to emerging community needs;
- provide appropriate governance for the acquittal of funding to ensure fairer outcomes for all applicants;
- ensure the financial sustainability of the Community Bank company through partnerships with community organisations that positively advocate to strengthen our profile and customer base.

Who can apply?

An **eligible applicant**:

- Is a **community-based group or organisation**, based in or servicing the Lancefield and Romsey communities.
- Is an **incorporated body**, or is partnering with an incorporated body.
- Is a **not-for-profit organisation**.
- Has met the terms and conditions and acquitted any previous funding from Community Bank Lancefield and Romsey.
- Has an **Australian Business Number (ABN)**.
- Is a **non-government entity**.

What if you don't have an ABN or yours is a Government ABN?

Work with a Project Partner who is an eligible entity and have them confirm:

- that they support your project;
- they will pass the funds on or apply them to the project; and
- how they are adding value to your project.

Please contact the Community Enterprise Foundation (CEF) Team foundation.mailbox@bendigoadelaide.com.au if you need clarification.

What can be funded?

Applications are invited for projects, programs or activities and events that demonstrate broad community benefit within the Lancefield and Romsey districts in the following areas:

- Families, children and youth activities
- Public health, safety programs and services
- Community capacity building projects
- Public education, schooling and libraries
- Innovative community services
- Cultural and arts initiatives
- Environmental projects
- Sporting and recreational projects

What will NOT be funded?

- Projects that benefit an **individual**.
- Projects seeking **retrospective funding**.
- **Staff payments or salaries**.
- Festivals and events that restrict broad community participation.
- **Private exhibitions** run by artists or exhibitions for the sale of artwork or other items that result in personal benefit.
- Previously funded **projects which have not been acquitted** to the satisfaction of the Board.

Our 2020/21 priority areas

Projects and activities that offer clear public benefit for the community, contributing to its development in building social capital, community welfare, environmental, health, education or cultural areas.

- Building community connectivity through encouraging participation, helping others and community strengthening.
- Supporting education learning and creativity.
- Involving sport to encourage healthy and active lifestyles, volunteering and social change.

In this round of funding, Community Bank Lancefield and Romsey will only consider **projects that start post October 2020 and finish by October 2021.**

Funding amount

A reasonable amount of funding is available annually provided the banks have the continued community business support. However every year the number of applications and total funding requests are in excess of the funds available.

As such the Board's decision to approve or decline an application, or approve partial funding, will be final. Applicants may be expected to secure other contributor's commitments for the balance of their project funds prior to funding being released by the CEF.

Our expectations of applicants

- Stay in contact, share post and tag us
@LancefieldRomseyCommunityBankBranches
- Willingness to be a positive advocate to strengthen our profile and customer base.
- A bank account held at the Romsey or Lancefield branch to deposit grant funds.
- Funds will be spent as outlined in the funding application and by the end of the 12 months in which they were awarded.
- Willingness to be audited for compliance with grant conditions
- Commitment to submit a completed acquittal form within 60 days after the project end date nominated on your application form.



Supporting documentation

To be considered, each application must include the following supporting documentation:



Financials

- Current signed Audited Financial Statements for the Applicant organisation and Project Partner (where applicable).
- If your organisation is not required to audit your financials, please provide a profit and loss statement as a minimum and a balance sheet if available. Please also include a current bank statement.



Quotes

Please note it is important to us that we support our local economy so we encourage you to obtain quotes from local trades and businesses wherever possible.

- Quotes are required for budget items wherever possible.
- If you have conducted this project/program before, copies of receipts/invoices that substantiate this request from previous expenditure may be acceptable together with a detailed budget.



Project budget

Please ensure that your budget and/or supporting documentation clearly shows how the funds requested will be spent.

- There is a budget Section on the application form which you will need to complete but you are welcome to also attached a spreadsheet/document showing a more detailed breakdown. When entering figures use whole dollars.
- Please show any other funding that you may have received or applied for on this project. If you have applied for funding and been successful please attach evidence of this.
- Don't forget to include in-kind support - volunteer hours are rated at \$30 per hour by the ATO.
- Remember Expenses - Income = \$ amount applied for.

Supporting documentation cont.



Public liability insurance

Recipients undertaking projects that engage with local community members require a \$10M Public Liability Insurance cover.



Letters of Support

Letters of support from others who will benefit from your project are helpful in demonstrating the importance of your project to the broader community.

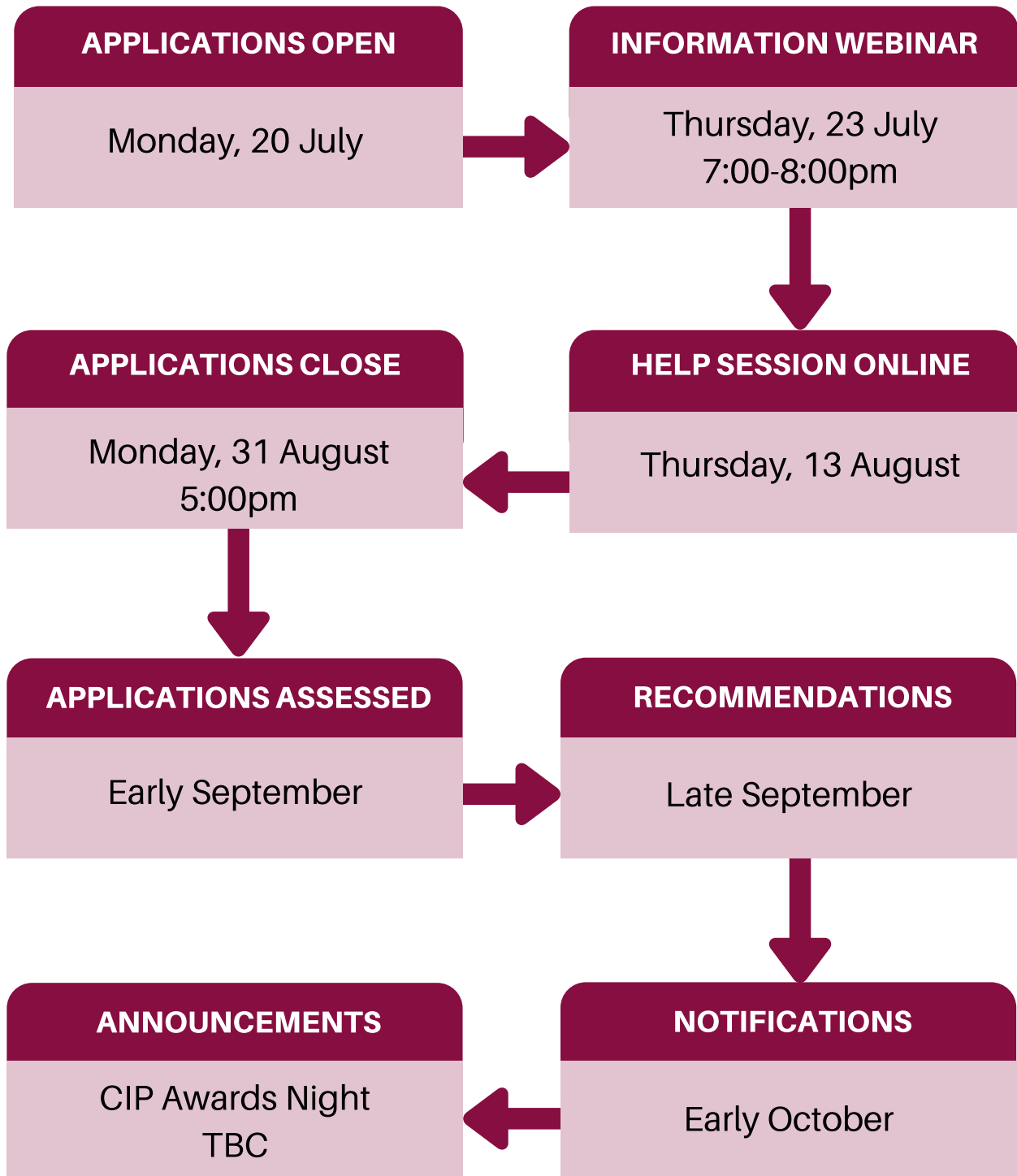
This especially applies if you are undertaking a renovation of a building/facilities such as halls and clubrooms for sporting purposes. If yours is a sporting facility we ask that you attached two letters of support from non-sporting bodies who will benefit from your project.



Government entities

State Government entities are encouraged to call the Foundation before submitting an application. There are some requirements that will apply.

Program timeline



How to apply

This year's CIP application process is fully **ONLINE**. No paper-based or emailed applications will be accepted.

To complete your application you will need:



- access to a computer



- an internet connection



- an email address

NEED SOME ASSISTANCE?

Come along to our
INFO SESSION Thursday 23 July
OR
HELP SESSION Thursday 13 August

Email cip@lrcfsl.com.au for
registration link

Step 1. Get your information together.

- Details of project and budget
- Organisational info:
incorporation number, GST status, ABN, annual financial report, Certificate of Currency for your public liability insurance, and bank account details.

Step 2. Open the online form

- Go to <https://cia.communityenterprise.foundation.com.au/Program/Index/1>
- Search for Community Bank Lancefield and Romsey in the program listing

Step 3. Lodge your application

- Access your existing account or register a new account. Once registered you can then login and start an application.
- For further guidance, download the [CEF How to Apply](#) document.
- A confirmation email will be sent to the registered email address once application has been submitted.

Assessment of applications

Applications will be assessed by the Community Enterprise Foundation and the Board of Community Bank Lancefield and Romsey branches.

This is a competitive process.

- Grants will be awarded at the **discretion of the Board**. Applicants that meet grant criteria are not guaranteed funding.
- Applications not eligible for funding through the CEF may still be directly funded through the Community Bank Lancefield and Romsey at the Board's discretion.
- The amount requested may be **fully or partially funded**.
- Securing a grant in previous years **does not guarantee funding** in subsequent years unless a written partnership contract applies.

Assessment criteria

- ✓ Reflects our priority areas.
- ✓ Commitment to accessibility and inclusiveness.
- ✓ Evidence of demonstrated community need and that a number of local community members likely to benefit.
- ✓ Evidence of financial viability and willingness to partially self fund or raise funds.
- ✓ Satisfactory completion of acquittal form for previous grants and sponsorships (as applicable).
- ✓ Demonstrated willingness and commitment to be a positive advocate (online, in print, to membership base) to strengthen our profile and customer base.

Agreements & acquittal

Organisations and project partners (where applicable) who successfully receive funding will be required to sign a partnership agreement.

Partnership agreements must be returned before funding payments are made. Applicants who do not return partnership agreements within the specified time frames will forfeit funding for that CIP year.

All successful groups who receive funding will be required to complete an evaluation at the completion of the grant process. This is used to measure the success of the partnership and to ensure that the funds have been spent as described in your application.

This will include a financial acquittal so please maintain a record/receipts of your expenditure.

We would also love to receive photos, media or any other information showing how your project has impacted on the community. Providing this important information insures that your organisation will remain eligible for any future funding.

Details of the acquittal process will be provided to successful applicants upon issue of their partnership agreement.



A bit about us.

The **Community Bank Lancefield and Romsey branches** were founded in 2002 by local residents and traders who wanted to ensure the community had a local bank available after existing banks vacated regional towns. Residents and traders wanted a bank that would share its profits to benefit the community.

Lancefield & Romsey Community Financial Services Limited functions as a locally owned franchise of Bendigo and Adelaide Bank Limited and is an incorporated body with a constitution.

During our 19 years in operation, we have **invested over \$1.6M into the local community and many worthy causes.**

We have supported our neighbourhood houses, sporting clubs, schools and kindergartens, and many community organisations. These actions have been made possible through the support of customers, shareholders and a dedicated team of branch staff and board of directors, who volunteer their time to oversee and drive the sustainability of the company.

See our Community Bank websites for further information:

www.bendigobank.com.au/branch/vic/lancefield-community-bank-branch/

<https://www.bendigobank.com.au/branch/vic/romsey-community-bank-branch/>

Queries?

For assistance with applications (registrations, system issues etc) or to discuss your organisation's project (eligibility, supporting documentation etc) initial enquiries should be directed to the Community Enterprise Foundation:

Phone: **1300 304 541**

Email: **foundation.mailbox@bendigoadelaide.com.au**